Routing & Approvals User Manual

Version 5.1 February 2011

FAMIS Services The Texas A&M University System

Introduction

The purpose of this manual is to assist in accessing and utilizing information in the Routing & Approval section of Financial Accounting Management Information System (FAMIS). FAMIS is an accounting system that responds to financial regulations applicable to educational institutions. All applications access a common database that allows different users to access identical information. Other applications include Financial Accounting, Purchasing, Fixed Assets and Sponsored Research. Manuals for these applications are being developed or are currently available.

The materials are grouped according to Routing & Approval functions. All associated screens and processing information are included along with field descriptions.

By utilizing the information and guidelines contained in this manual, a user should be able to access electronic office information, create and modify desks and views, and create routing paths for documents to be approved and signed electronically.

The FAMIS User Manuals are in a constant state of revision, due to screen updates, changes in procedures, or any one of a multitude of reasons. If you would like to make suggestions or call attention to errors, please contact us at (979) 458-6450, or copy the page with the error, note the correction or suggestion and send it to:

College Station based:

FAMIS Services The Texas A&M University System 1144 TAMU College Station, TX 77843-1144

Non-College Station based:

FAMIS Services The Texas A&M University System 200 Technology Way, Suite 2180 College Station, TX 77845-3424

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Section I Routing & Approvals Introduction

Introduction

Routing & Approvals facilitates the electronic routing and approval for various types of documents. This module accommodates documents from different modules – Purchasing documents, DBR (Departmental Budget Request) documents and EPA documents. Documents in Routing & Approvals can be viewed in CANOPY or on the FAMIS screens.

Routing & Approvals has become more complex with the continuing addition of new document types. Each document type has its own set of rules for routing and the structures can often be different to accommodate these different rules.

Document Routing Process

Generally, when a document is closed, it is submitted to Routing & Approvals where it follows a pre-determined path for various types and levels of approvals. Most documents go through a **Department** path first. Once all department approvals have been given, the documents may pass through an **Executive Level** for higher authority approvals. Finally for most document types, they pass to a **Processing Office** and follow yet another path.

Note that there are documents that can be initiated in a Processing Office and don't go through the Department and Executive Levels.

The chart on the following page shows the process and some of the decision points for documents that are related to Purchasing, Financial Accounting, Accounts Payable and Budget Payroll.

The Documents as they relate to the circles on the chart below are:

PUR	 Purchasing related documents: Limited Purchase Exempt & Delegated Purchases Requisitions Purchase Orders
ΑΡ	 Accounts Payable related documents: Purchasing Invoice Problem
FA	 Financial Accounting related documents: DBR – Departmental Budget Request
ΡΑΥ	 Payroll/Budget related documents: EPA – Employee Payroll Action



Section II Basic Concepts for Routing & Approvals

Basic Concepts

Routing & Approvals has two different perspectives: the User Perspective and the Electronic Office Manager & Delegates Perspective.

User Perspective Summary

The first concept focuses on those **USERS** who approve or sign documents that come to them through Routing & Approvals. Also included as a user are the document creators as they have interest in the authorization of the document.

Users access their inbox / outbox, approve or sign documents and perform these functions either using CANOPY (under the Routing TAB) or the FAMIS screens.

Office Manager & Delegates Perspective Summary

The second concept focuses on the **ELECTRONIC OFFICE MANAGERS & DELEGATES** and their responsibility for the set up and maintenance of the Routing & Approvals structure.

This functionality is ONLY available through the FAMIS screens; there is no equivalent in CANOPY.

Security Access

User Perspective

To get to the Inbox, Outbox and other user features, users need to have screen security for the 910 series of FAMIS screens as seen on Menu 90. Your security officers can assist with this task.

To access particular documents, the user may need to have entity security for that department of the accounts on the document.

Office Manager & Delegates Perspective

To maintain the structure of the Electronic Office, the user needs to have screen access to most of the screens on Menu M91. Your security officers can assist with this task.

Essentials of Document Routing

Each document, when created, is given a unique identifier. When a document is submitted to Routing & Approvals, it follows a pre-determined **path** for approvals. Here are some concepts and terms to help you to understand the Routing & Approvals process.

Routing Document Identification Numbers

Each routing document is uniquely identified with a three part configuration which includes the System Member code as well as the document number. In addition, on the front is tagged the type or form of the document. Examples are **PRQ07L433242** and **EWR230568457** or **DBR04U569448**.

The routing document identification number consists of these three parts:



Document = PLP01L010014

Multiple Departments on a Document

When a document requires authorization from multiple departments, documents route through the appropriate routing structure for the first department, then continue on through the routing structure for the second department and so on until all Department routing has been satisfied.

Different types of documents may have different rules – for EPA documents, the department routing list is built automatically as the document information is entered. For DBR documents, routing for approval is only through the Source department with a notification copy sent to the Destination department.

If a department is on the document, but is not set up in Routing & Approvals (can be viewed on the Department Table, Screen 860), there is a message in the routing history to that affect and that manual routing may be necessary.

Electronic Offices

The Electronic Office provides the mechanism to efficiently manage the approval process. The purpose of the Electronic Office is to define the path(s) that documents will follow. There are three levels of electronic offices: Department, Executive and Processing Office. Generally, at the Department Level, each Electronic Office represents one department, although other aggregates may be created.

Electronic Desks

Desks are electronic 'approval' or 'review' stations. A routing path is constructed by linking desks together in a linear fashion within an electronic office. People are 'put on' or assigned to a desk. There can be many persons on one desk and one person can be on many desks. There are three basic types of desks: **Creator** desk, **Approver** (review/approval) desk and **Signer** Desk.

Creator Desk

This is a special desk that serves one main purpose: the people who are on this desk receive notification copies of document rejections. A creator of a document does NOT have to be on the Creator Desk to create and submit a document to Routing & Approvals.

Document 'Creator' – What does this mean?

The creator 'submits' the document for routing and the system considers this the first approval of the document. The person who submits the document for routing is the official creator regardless of who else may have entered document details.

Approver Desk

This is a general desk that can be created to insert multiple approvers into a Routing Path. These approver desks are also used at the Executive Level and Processing Level.

Approvers vs. Signers

Essentially, approvers and signers are equivalent. At the Department Level, all documents must have approval from someone on the Signer Desk.

Signer Desk

This is always the last desk in the Department path and is considered the official signoff on the accounts for the document.

Required Number of Approvals and Signatures

At the Department Level, the rule is that two people must 'approve' or 'touch' the document and the creator is considered the first approval. Therefore, only a **Creator** and a **Signer** are required for the document to pass this level.

Substitute Approver or Signer

An electronic desk can have multiple primary and multiple substitutes assigned. It is recommended that **ALL desks have at least two people** to avoid delays in advancing documents within Routing and Approvals.

Primary assignees all received the document in their respective Inboxes. When the first person takes action on the document, the document 'goes out' of all Inboxes.

Substitute assignees do not receive the documents in their respective Inboxes, but must access the Inbox of the person for whom they are substituting in order to take action on the document.

Routing Paths

Documents follow routing paths that can go from very simple to quite complex.

Routing Paths are defined for each of the Routing Levels - Department, Executive, Processing Office. Different paths are defined based on document type or form (EPA, PLP, DBR, etc.). There are many variables in designing the routing paths.

A **simple** Department Level path consists of a **Creator** Desk and a **Signer** Desk, for example. This satisfies the rule that two people must 'touch' the document.



A **more complex** path consists of a Creator Desk, Approver Desk and a Signer Desk. The addition of a third desk gives Sandy or Terry the opportunity to review or approve the documents.



Routing Through Levels

Complex paths are often constructed to take advantage of the flexibility available. The path that an individual document takes may actually consist of multiple desks on multiple paths and across different levels depending on its requirements for approval.

There are three Routing levels:

1. **Department**: Routing through the **Department Level** includes the department(s) defined for the document type. If there are two departments required, the document routes through one department and then the second department and so on until all departments/accounts are covered.

- 2. <u>Executive:</u> Routing through the Executive Level allows for approval and review by a higher level of the organization. Departments are assigned to an executive level and then documents for that department will route through the executive structure.
- 3. <u>Processing:</u> Routing through the **Processing Office Level** allows for special processing for certain types of documents. For example, Requisitions all go to a Processing Office where they are processed into a Bid or Purchase Order.

Section III Inbox, Outbox, and Other Functions User Perspective

CANOPY Inbox, Outbox & Other Functions

The User Perspective focuses on the approvers and signers and how they access their routing documents for approval. Functionality includes the Inbox, Outbox and the Substitute Inbox and Outbox where a person can approve or reject the documents that have been sent for approval.

In essence, the basic process of approving (or rejecting) documents is fairly simple. Given proper security, each user has a Document Inbox which collects all the documents that are routed to the user for various reasons. In addition to 'approve' and 'sign', there are notification copies sent to the creators.

CANOPY presents an easy website for you to access your documents, review them and approve or reject as you wish. All of this functionality is also available on the FAMIS screens. The FAMIS screens are included both at the end of this section and in full detail later in this manual.

CANOPY Tabs

You can access Routing & Approvals two ways from the Main CANOPY page:

- the ROUTING TAB at the top of the page
- the <u>Routing Document Routing Module</u> link under Available Modules.

Notice the **INFO** message that there is 1 item in the Inbox!!

-						
Cano	PY		(ctom)			ROUTING
The Texa	S AQIM UI	liversity Sy	stem			2/
EPA	FFX	FRS	Routing	System		
	FO: You	have 1 ite	m in your In	box.	/	$\overline{\mathbf{x}}$
<u> ЕРА</u>	- Person	nel Action	Module			1
► FFX	- Fixed A	Assets Moo	<u>tule</u>			
► FRS	- Financi	ial Reportir	ng Module			- S
► Rou	iting - Do	ocument Ro	outing Modu	<u>le</u>		
D Sys	<u>tem - Sy</u>	<u>stem Setti</u>	ngs and Ger	neral Informat	tion	-

CANOPY Inbox, Outbox & Other Functions (cont'd)

Four TABS provide the access to the user's **Inbox**, **Outbox**, **Document** and **Profile** Information.

Can The Te	OPY xas A&M U	niversity S	ystem	Ì		
EPA	FFX	FRS	Routing System			
Main M	Main Menu © Routing © Inbox					
Docume	nt:		🚽 🗑 Substitute: My Inb	ox <		
Approva	l Only: Or	Yes 🔍 No	a para par	and the second s		

Inbox Tab (includes the Substitute Inbox)

The Inbox displays the routing documents that have been routed or recalled to you for approval, notification, or addressing a problem. For example, when a document such as a Limited Purchase (LP) or an Exempt Purchase (EP) is closed and routed, a routing document is created – this is the document that is routed and displayed in the Document Inbox.

As an authorized substitute, you can access the Inbox of the person for whom you are substituting. While you can see all documents in the person's Inbox, you can only access those that are applicable to you being the substitute. The person may be on various desks and you may not be the substitute on all of them.

ICONS

Column Sort – all columns can be sorted by clicking on column header

PDF Print Creates a PDF version of the document

Notes 📮 isplays any notes associated with the document

Time Changes display to include time of arrival <u>Default View</u> changes view based on document type, like EPA Column Filters of opens column filters

Light bulb 😪 displays ten most recently used documents

Canopy The Texas A&M U	Jniversity	System	I						,	<u>Logout</u>
EPA FFX FRS Routing Campus: TEXAS A&M UNIVERSITY (02) Fiscal Year: 20							2008 - CC/FY			
Main Menu 🌣 Ro	uting 🗅 🛛	inbox						н	are Send Fe	edback
Inbox Outbox D	ocument	Profit								
Document:			💡 Substitute	e:	My Inbox Search for Subs	stitute:		Sea	arch	
Approval Only: O	Yes 🖲 No									
Submit										
				I	NBOX CONTENT (TOTAL ITEMS: 1) DEFAL	JLT V IEW				6 🗉 r
! Document	Action	Status	Arrival Date		Summary	Account	Total	Creator	Create Date	Quick Action
PLP01L712435	📕 FYI	Final	05/21/2007	P	SYSTEMS ANALYST II ADVERTISEMENT	*see doc*	\$167.40	TERRY, LINDA K	02/07/2007	Discard
										Discard
										All FYIS
Canopy, a Business Computing Services application. The Texas A&M University System					Top of Page			Theme: Large F	ont 💌 🛛 Set	Theme
Version: 3/18/2008 5	5:26:04 PM	1 Debug	Info Site						Turn P System -	aging On Site Man
management									oyatem -	опес мар

Filters

Filters help you to look at only certain types of documents. You may filter the displayed items to show a specific document by:

- typing the document number in the field provided
- choose the 'Yes' option next to "Approval Only" box to only show just the documents that need to be approved

Click on the "Submit" button to apply the desired filters and display the documents.

<u>Substitutes</u>

When you are a substitute for another person, you have the ability to view their Inbox and take action on those documents for which you are authorized.

In the box next to "Search for Substitute:" enter the last name (can be only part of the name) to begin the search. Use the drop down list to choose the correct person.

In the box to the right of "Substitute:" you may select "My Inbox" or "My Creator Desks" to alter the items displayed on your page.

Click on the document identifier to access the approval page. You can only access those documents for which you are authorized.

Quick Actions

If you are the primary approver or signer (not a substitute), you can click on the word Approve or Discard or Discard All FYIs to register a quick action.

CLICK ON THE DOCUMENT TO REVIEW THE DETAIL. CANOPY SWITCHES YOU TO THE DOCUMENT TAB AND DISPLAYS THE FULL DOCUMENT.

Outbox Tab (includes the Substitute Outbox)

The Outbox displays all routing documents that you have taken action on.

If the document is in "Finished" status, you will need to check the "Include Finished" box under "Filters:" to include these documents in the display.

The Substitute Inbox and the Substitute provide access to another person's Inbox and Outbox. You may access these features if you are a substitute for the person on any desks. **You will see the list of all documents but will only be able to access those documents on the desks where you are a substitute.**

Column Sort – all columns can be sorted by clicking on column header

Lightbulb 💡	displa	ays ten n	nost recently used	d documents	
Canopy The Texas A&M University	sity Syste	m			<u>Logout</u>
EPA FFX FR: System	S Ro	outing	Campus:	TEXAS A&M UNIVER	RSITY (02) Fiscal Year: 2008 Set CC/FY
Main Menu © Routing	⇔ Outbo	x			HELP? Send Feedback
Inbox Outbox Docum	ent Profi				
Document:		💡 Substit	ute: My Outbox 💌	Search for Substitute:	Clear Found 100 names.
Start Date: 3/11/2005	T End	d Date: 4/11	/2008 🔽 Include Finis	shed: • Yes • No Inclu	ude Discards: [©] Yes [©] No
Submit					
OUTBOX CONTENT (TOT	AL ITEMS: 1)			
Document Number	Status	Action	Action Date	Notes Indicator	Summary
PLP01L712435	Final	Discarded	04/26/2007 12:54 PM	*	SYSTEMS ANALYST II ADVERTISEMENT
Canopy, a Business Compu The Texas A&M University S Version: 3/18/2008 5:26:04 Management	ting Servic System 4 PM <u>Debu</u>	es application I <u>g Info</u> Site	. <u>Top c</u>	<u>f Page</u>	Theme: Large Font Set Theme Turn Paging On System - Site Map

Filters

Filters help you to include certain types of documents. You may filter with the following:

- type the document number in box or use the light bulb to choose a document
- enter Start Date and End Date to change the default time frame
- choose the 'No' option next to "Include Finished" box
- choose the 'Yes' option next to "Include Discards" box

Click on the "Submit" button to apply the desired filters and display the documents.

<u>Substitutes</u>

When you are a substitute for another person, you have the ability to view the documents in their Outbox.

In the box next to "Search for Substitute:" enter the last name (can be only part of the name) to begin the search. Use the drop down list to choose the correct person.

In the box to the right of "Substitute:" you may select "My Outbox" or "My Creator Desks" to alter the items displayed on your page.

Click on the document identifier to access the full document detail. You can print a PDF version of the document using the 🔁 icon.

Document Tab

The document tab displays the full detail of the document. If you have 'Paging On' set to blank (see Profile Tab), you can scroll up and down through all the details of the document.

You can print a PDF version of the document using the 🖾 icon.

Document Details

Be aware that the type of data or sections that are displayed are dependent on the type of document. Hence, you will see different sections for an EPA document than for a Purchasing document.

Purchasing document:

Document Information Vendor Information Departments Line Items Account Summaries Notes Routing Notes Document History Current Location Department Routing Document Held By FYI Copy

EPA document:

EPA Document Information Position Information Occupant Information Rate Information Funding Source Lines Net Funding Document Changes in Payroll Routing Notes Document History Current Location Department Routing Document Held By FYI Copy

DOCUMENT INFORMATION & VENDOR INFORMATION - PURCHASING

Canopy The Texas A&M	University System				<u>Logout</u>
EPA FFX System	FRS Routing	Can	npus: TEXAS A&M UNIVERS	SITY (02)	Fiscal Year: 2008 Set CC/FY
Main Menu 🌣 R	outing © Document				HELP? Send Feedback
Inbox Outbox	Document Profile				
Document: PROC	12P802767	ion:			
	Would Act				
Submit 🌆					
Document In	formation				
Document:	<u>R802767</u> 🔁				
Category:	RO	Document FY:	2008	Total:	\$445,869.00
State Req #:		User Ref:	270300-08517	FOB:	
Print Doc:		Research:	N	Type Funds:	L
PCC Code:		Route Status:	Final	Type Order:	HIED
Summary:	IBM N5300 STORAGE SYSTEM (BOLTON)	LDT Code:		Cat/Order:	Ν
Arrived:	03/17/2008 at desk in office - fo	or action Approve	e		
Dept/Sub:	EIS - Enterprise Information Sys	stems			
Vendor Infor	mation				
Reimburse To:					
Vendor:		Invoice To:	Computing & Information Serv. ATTN: DOROTHY LEWIS COLLEGE STATION, TX 77843-3142	Ship To:	Computing & Information Srvcs. COMPUTING SERVICES CENTER COLLEGE STATION, TX 77843-3363
		Buyer:	RKW / WOLF, RICK 979-845-4538	Contact:	Loretta Hayes 979-845-8421

DEPARTMENT & LINE ITEMS & ACCOUNT SUMMARIES - PURCHASING

DEPA	RTMENTS							
Dept	SubDep	ot De	partment Name		El	ectronic Routing		
EIS		ENTERPRISE INFORMATION SYSTEMS Y						
LINE	ITEMS							
Item	Descriptio	n		Quantity U	лом	Unit Price	Amount	
1.0	TotalStorag	je System for I	Production, IBM N5300 (more)	1.00 E	A	\$97,144.00	\$97,144.00	
2.0	TotalStorag	je System for I	Disaster Recovery, (more)	1.00 E	A	\$97,144.00	\$97,144.00	
3.0	Cisco Swite	hes for Produc	tion with the (more)	2.00 E	A	\$3,350.00	\$6,700.00	
4.0	Total for Ci	sco Switches fo	or Disaster (more)	2.00 E	A	\$3,350.00	\$6,700.00	
5.0	TotalStorag	ge Software for	Production, IBM (more)	1.00 E	A	\$83,211.00	\$83,211.00	
6.0	TotalStorag	je System Soft	ware for Disaster (more)	1.00 E	A	\$83,211.00	\$83,211.00	
7.0	3 Years 24	x7, 4 Hour Res	ponse On-Site (more)	2.00 E	A	\$20,216.00	\$40,432.00	
8.0	3 Years 24:	x7 Software Su	upport/Subscription (more)	2.00 E	A	\$4,110.00	\$8,220.00	
9.0	3 Years 24	x7 Support for	(4) 2960 Cisco (more)	4.00 E	A	\$844.00	\$3,376.00	
10.0	IBM Tivoli S	torage Manage	er Extended Edition (more)	1.00 E	A	\$9,694.00	\$9,694.00	
11.0	IBM Tivoli S	storage Manage	er Extended Edition (more)	1.00 E	A	\$9,694.00	\$9,694.00	
12.0	Implementa	ation Services f	or Production and (more)	1.00 E	A	\$22,500.00	\$22,500.00	
13.0	Travel & Liv	ing Expenses	(more)	1.00 E	A	\$2,300.00	\$2,300.00	
14.0	Total Solut	ion Discount (n	nore)	1.00 E	A	(\$24,457.00)	(\$24,457.00)	
Acco	UNT SUMMAR	UES						
Camp	us Code	Fiscal Year	Account	Des	criptio	n	Amount	
02		2008	210480-10015 8435 Computer Equipment	GEN	NERAL E	IS SUPPORT	\$205,731.00	
02	2008 210480-10015 8440 Purchase & Maint of Cmptr Software GENERAL EIS SUPP				IS SUPPORT	\$185,810.00		
02		2008	210480-10015 5536 M&R - Cmptr Equip - not TAMU CIS	GEN	NERAL E	IS SUPPORT	\$43,808.00	
02		2008 210480-10015 5521 M&R - Cmptr Software - not TAMU CIS				IS SUPPORT	\$8,220.00	
02		2008	210480-10015 5355 Consultant Services - Computer	GEN	NERAL E	IS SUPPORT	\$2,300.00	

NOTES & ROUTING NOTES & DOCUMENT HISTORY

NOTES						
Title	NoteText					
Doc Header:	>>Note entered 02/22/08 BY HAYES, LORETTA A.					
	DOCUMENTATION PROVIDED BY MIKE BOLTON WHICH					
	INCLUDES SOLE SOURCE JUSTIFICATION AS WELL					
	AS SIRIUS PROPOSAL DATED 2/7/08 BEING SENT					
	VIA EMAIL TO KAREN KUBICA AS BACKUP DOCUMEN-					
	TATION FOR THIS REQUEST.					
ROUTING NOTES						
Notes						
>> Reason held on	03/10/08 by KUBICA, KAREN G:					
RKW						
>> Reason held on	03/10/08 by TENORIO, FELISITA:					
REQ. TO TML						
>> Reason held on	03/10/08 by KUBICA, KAREN G:					
RKW	RKW					
>> Item Transfer on 03/31/08 to Doc: P803914 Add Note						

DOCUMENT HISTORY

Desk	Fwd Name	Office	Date	Name	Phone	Action
CREATE DSK			3/4/2008 9:07:13 AM	Hayes, Loretta A	979-845-8421	Submitted
APPROVER		02-EIS	3/7/2008 1:53:30 PM	Dunlap, Sophia A	979-458-3466	Approved
SIGNER DSK		02-EIS	3/7/2008 2:23:15 PM	Kannappan, Ramesh S	979-845-6458	Signed
CENTRLDESK		02-PURCHASING	3/7/2008 3:36:26 PM	Constancio, Angelita G	979-845-4570	Approved/FYP
			3/10/2008 7:24:28 AM	Hayes, Loretta A	979-845-8421	Discarded
COMP-C1		02-PURCHASING	3/10/2008 9:20:31 AM	Kubica, Karen G	979-845-4570	Held
COMP-C1		02-PURCHASING	3/10/2008 9:22:33 AM	Tenorio, Felisita	979-845-4570	Approved/FYP
COMP-C2		02-PURCHASING	3/10/2008 9:22:38 AM	Tenorio, Felisita	979-845-4570	Held
COMP-C2		02-PURCHASING	3/10/2008 9:27:15 AM	Tenorio, Felisita	979-845-4570	Approved/FYP
COMP-C1		02-PURCHASING	3/10/2008 2:32:49 PM	Kubica, Karen G	979-845-4570	Held
			3/17/2008 3:06:32 PM	Kubica, Karen G	979-845-4570	Transfer
			3/18/2008 7:45:31 AM	Hayes, Loretta A	979-845-8421	Discarded
			4/1/2008 7:59:20 AM	Hayes, Loretta A	979-845-8421	Discarded

CURRENT LOCATION & DEPT ROUTING & DOCUMENT HELD BY & FYI COPY

CURR	ENT LOCATION						
	No records found to display.						
DEPT	DEPT ROUTING						
Desk	Fwd Name	Office	Date	Dept. Code	Department Name	Status	
		EIS		02-EIS	Enterprise Information Systems	Routing Completed	
Docu	MENT HELD BY						
				No rec	ords found to display.		
FYI C	ОРҮ						
				No rec	ords found to display.		
Canopy, a Business Computing Services application. The Texas A&M University System Version: 3/18/2008 5:26:04 PM <u>Debug Info</u> <u>Site</u> <u>Management</u>			applicatior Info <u>Site</u>	1.	Top of Page	Theme: Large Font Set Theme Turn Paging On System - Site Map	

<u>Actions</u>

To take action on a document, click on the drop down box and select the desired routing action. Then press the Submit button. The choice of Actions displayed depends on the document and its routing. Possible actions include:

APPROVE (APP)	
REJECT TO CREATOR (REJ)	
APP(approve) AND ROUTE FOR APP (approval)	(FYA)
ROUTE FOR APP AND RETURN (FRA)	
PUT DOCUMENT ON HOLD (HLD)	
SEND INFORMATION COPY (FYI)	
DISCARD FROM YOUR INBOX (DIS)	
Canopy	
	Computer TEXAS A&M LINIVERSITY
EPA FFX FRS Routing System	Campus: TEX to Adm of the Roma
Main Menu © Routing © Document	
Inbox Outbox Document Profile	•
Document: PRQ02R802767 🛛 💡 Routing Action: Sele	ect an action
Submit	

APPROVE (APP)

After review of the document detail, you may approve it by choosing the APP and click on the Submit button. You will see a message for you to 'OK'. Different types of documents will display different messages. Some examples:

Windows	Internet Explorer
?	I approve the purchase of all items described in this document and that this order falls within the purpose for which the account was established. I will assist in resolving any problems associated with the delivery or payment of these goods or services.
	OK Cancel
Window	vs Internet Explorer
?	Select OK to approve this Employee Payroll Action.
	OK Cancel

<u>**REJECT – (REJ)**</u>

If you choose Reject (REJ) and click on the Submit Button, a new box will display to enter <u>Action Remarks</u> explaining why you are rejecting the document. The document goes to the Inbox of the document creator and all who are on the Creator Desk.

Canopy The Texas A&M Univers	System	
EPA FFX	S Routing System Campus:	SA
Main Menu © Routing	locument	
Inbox Outbox Docume	Projle	
Document: PLPETL600114	Routing Action: REJECT TO CREATOR (REJ)	
Action Rer	rks:	4
Submit		

****APPROVE AND FORWARD – (FYA)****

This action records your Approval and then Forwards the document to a person or desk that is outside of the scheduled path. Example of this type of action is to send a document that purchases computers to the computer expert in the department. This requires you to enter either a person or a desk for further routing.

<u> </u>				
Canopy The Texas A&M University S	System			
EPA FFX FRG	Routing	System		
Main Menu © Routing © Do	ocument			
Inbox Outbox Document	Profile			
Document: PLPETL600114	📃 🎯 Routing Acti	on: APP AND ROU	JTE FOR APP (FYA)	-
т	o Person:	Se	earch	
	To Desk: CC:	Office:	Desk:	
Submit				

FORWARD AND RETURN APPROVAL - (FRA)

This action Forwards the document (and does not register your approval). When this person approves the document, it returns to you in your Inbox. Then, based on what that person did, you can register your approval or rejection.

Canopy The Texas A&M University	System						
EPA FFX FR	S Routir	g	System				
Main Menu ▷ Routing ▷ D Inbox Outbox Document	ocument						
Document: PRQPVR200086	💡 Roj	iting Ac	tion: ROUTE	FOR APP AND	RETURN (FRA) 💌	
0	To Person:	:	Office:	Search	Desk:		1
Submit							

This requires you to enter either a person or a desk for further routing.

PUT DOCUMENT ON HOLD - (HLD)

This action marks the document on Hold. This is a courtesy hold and does not prevent others from advancing the document. <u>Action Remarks</u> are required.

Canopy The Texas A&M University Sys	tem		
EPA FFX FRS	Routing System	c	ampus: SA
Main Menu Routing Docu Inbox Outbox Document Pr	ment ofile		
Document: PRQPVR200086	Routing Action: PUT DOCU	MENT ON HOLD (HLD)	
Action Remarks:			*
Submit			
SEND INFORMATION COPY - (FYI)

This action sends an information copy to the persons or desk requested and does not stop the document from continuing through the routing path. This action requires you to enter either a <u>person(s) or a desk</u> for further routing.

Canopy The Texas A&M University System
EPA FFX FRG Routing System
Main Menu 🕫 Routing 🕫 Document
Inbox Outbox Document Profile
Document: PRQPVR200086 Souting Action: SEND INFORMATION COPY (FYI)
To Person: Search
Search
Search
To Desk: CC: Office: Desk: CC:
Submit

DISCARD -(DIS)

This action discards Notification and Final copies from your Inbox.

Canopy The Texas A&M University System						
EPA FFX FRS Routing System						
Main Menu Routing Document						
Inbox Outbox Document Profile						
Document: PRQPVR200058 Prouting Action: DISCARD FROM YOUR	INBOX (DIS) 💌					
Submit						

Profile Tab

The Profile tab allows you to customize your CANOPY experience.

User Profile

In the User Profile section, you can edit your personal information. This includes updating your work address, mail code and phone number.

The email address is especially important as it is used to deliver email notifications that there are documents in your Inbox if you choose that option below.

A	FFX	FRS	Routing	System			
n Me	nu ⇔Syste	e m ⇔User Pro	file				
							FAMIS USER
AMIS	User Pro	file for		_			
tatem	ent of Resp	onsibility Dated			VIDIDO		
Work Address:		* 446 JOF	HN B. CONNALL	Y BLDG			
			TEXAS	A&M UNIVERSI	TY		
			SYSTE	M			
		Mail Code	e: C1144				
	Work	Phone Numbe	r: 979	287 4444	ext.		
		Fax Numbe	r: 409	666 8975			
		City, State, Zip	COLLE	GE STATION	TX 77	840	
				,			
		Email Address	whoat@)tamu.edu			

Routing Notification Profile

The second section allows you to choose how and when to receive email notifications that documents are awaiting action in your Inbox. You may change your settings as often as you wish.

Purchasing, PIP and DBR documents can have different settings than EPA documents. Notification Types gives you the choice of receiving notices only for those documents that require approvals.

The frequency chooses how often to receive the notification email that documents are waiting. The documents are in your Inbox immediately upon document close, but by choosing Daily or Weekly you will receive the email once daily or once weekly. Voided Approvals indicates that you want to receive email notification when a document has been voided or rejected by someone further down on the approval path than you. This indicates that the document was returned to the Creator and must go through all routing again.

rchasing, PIP, and DBI	R Documents (or other non-EPA documents)
Notification Types:	Approvals Only O All (include notifications) O None (no emails
Notification Frequency:	Every Document Daily Weekly
Voided Approvals:	🗘 Yes 🏵 No
PA only Settings	
EPA Notification Types:	Approvals Only All (include notifications) None (no emails)
A Notification Frequency:	Every Document Daily Weekly
EPA Voided Approvals:	O Yes O No

CANOPY System Profile

This section allows you to customize the way that you display pages in CANOPY. Paging On means that you will see a page of data based on the Page Size you set. With Paging On not checked, you can scroll through all the data that is returned to you by a search without going from page to page.

a		CANOPY SYSTEM PROFILE SETTING
Canopy System Setting	gs	
Paging On:		
Pager Always Visible:		
Page Totals:		
Page Size:	25	
Inbox Page Size:	50	
Maximum Record Count:	1000	
	Note: The larger the record count the longer the search will take and the longer it may take to load the page.	
LineItem Details:	0	
Edit		
Note: These setting may not	t affect ALL pages; some pages are set progra	ammatically for optimal viewing and data retrieval.

FAMIS Screens Summary

This section gives you a quick reference to approving documents using the FAMIS screens. The Routing and Approval Menu M90 helps you identify which screens to see when working with documents that are being routed.

Note that detail of the FAMIS screens can be found in a later section of this manual.

M90 Routing and Approval Menu	06/06/07 09:01
	FY 2007 CC 02
Screen:	
910 Document Inbox	
911 Document Inbox by Name	
912 Document Outbox	
913 Document Outbox by Name	
914 Document Routing History	
915 Approval Profile by Name	
918 Documents by Department	
* Other Menus *	
M91 Electronic Office Management Menu	
· · · · · · · · · · · · · · · · · · ·	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF	710PF11PF12
Hmenu Help EHelp	

Menu M90 - Routing and Approval Menu

When you logon to FAMIS, the first screen you see is the FAMIS Bulletin Board. If you have documents that you must approve or sign, a pop-up window will display across the Bulletin Board to let you know. You may then proceed to Screen 910, your document Inbox, to see the documents that await your approval.



Steps for Using the FAMIS Screens

1. Look at routing documents awaiting your approval – Screen 910.

Screen 910 - Document Inbox (Panel 1)

910 Document Inbox	06/07/07 15:42
	CC AA
Screen: Document: Office:	Desk:
Approvals Only: N	Panel: 01 More>>
	Requested
Sel Document ID N Doc Summary	Action Status
<pre>PRQSAR000013 * COPIER RENTAL FOR 4-1-00 THROUGH PRQSAR000009 * FURNITURE FOR MY OFFICE PRQSAR000019 * RENTAL OF A XEROX 1090 PRQSAR000024 * FURNITURE FOR MY OFFICE PRQSAR000024 * FURNITURE FOR MY OFFICE PLESAL000066 * OFFICE FURNITURE PLESAL000075 MAHOGANY DESK PRQSAR100001 * COMPUTER MONITOR FOR JOHN JONES</pre>	8- FYA/Approve FYA/FRA Rt Notify Final Notify Recalled Notify Final PF Keys to scroll display and view more information
*** End of List 8 Document(S) Found *** Enter-PF1PF2PF3PF4PF5PF6PF7PF8 Hmenu Help EHelp Discd RHist Sel	PF9PF10-PF11'F12 All Left Right

Press PF11 to Scroll right and view more information on Panels 2 and 3.

Screen 910 - Document Inbox (Panel 2)

910 Document Inbox			06/07/07 15:43
			CC AA
Screen: Document:	Offic	ce:	Desk:
< <more< td=""><td>Approvals On</td><td>ly: N</td><td>Panel: 02 More>></td></more<>	Approvals On	ly: N	Panel: 02 More>>
			Current
Sel Document ID FY Subm	itted by	Submitted	Arrived CC Unit
<pre>_ PRQSAR000013 2000 SANDERS,</pre>	SONJA S	03/27/2000	03/27/2000 INRE FAMIS
_ PRQSAR000009 2000 CARLSON,	COLLEEN C	03/27/2000	04/18/2000 53
<pre>_ PLPSAL000006 2000 CARLSON,</pre>	COLLEEN C	03/28/2000	PE Keys to scroll
_ PLPSAL000075 2000 CARLSON,	COLLEEN C	03/28/2000	FT Reys to scroll
<pre>_ PRQSAR100001 2001 CARLSON,</pre>	COLLEEN C	11/21/2000	display and view
			more information
		'	
*** End of List 8 Do	cument(S) Four	nd ***	
Enter-PF1PF2PF3PF4P	F5PF6PF'	7PF8PF	9PF10PF11PF12
Hmenu Help EHelp	Discd RH:	ist Sel Al	ll Left Right

Screen 910 - Document Inbox (Panel 3)

910 Document In	xox			06/07	/07 15:45
Screen: Dod < <more Sel Document ID</more 	cument:	O: Approvals Current Desk	ffice: Only: N View	Desk: Panel: 03	CC AA
_ PRQSAR000013 _ PRQSAR000009 _ PRQSAR000019 _ PRQSAR000024	I	NDIVIDUAL			
*** End Enter-PF1PF2 Hmenu Help	of List 8 Do -PF3PF4 EHelp	cument(S) 1 PF5PF6 Disco	Found *** PF7PF8 1 RHist Sel	-PF9PF10PF1 All Left Rig	1PF12 ht

2. <u>Select the document</u> you want to review by typing an 'X' in the Sel: field.

You may type an 'X' next to multiple documents. When done, you may press PF8 or Enter to begin to work with the Cover Sheets of the chosen documents.

Screen 910 - Document Inbox (Panel 1)		
910 Document Inbox	06/	07/07 15:42
Screen: Document: Office: Approvals Only: N Sel Document ID N Doc Summary	Desk: Panel: 01 Requested Action	More>> Status
PRQSAR0000013 * COPIER RENTAL FOR 4-1-00 THROUGH 8- PRQSAR000009 * FURNITURE FOR MY OFFICE PRQSAR000019 * RENTAL OF A XEROX 1090 PRQ R MY OFFICE PRQ PRQ Type 'X' to select R MY OFFICE PLP document SANY DESK	FYA/Approve Notify Notify Ntfy/Final Notify Notify	FYA/FRA Rt Final Recalled Final Final Recalled fy
_ PRQSAR100001 * COMPUTER MONITOR FOR JOHN JONES *** End of List 8 Document(S) Found *** Enter-PF1PF2PF3PF4PF5PF6PF7PF81 Hmenu Help EHelp Discd RHist Sel 2	Notify PF9PF10P All Left R	Rejected F11PF12 ight

<u>Review the Cover Sheet</u> for the document (in the pop-up window).



4	+	+
	Screen: 06/07/07 *** Purchasing Document Cover Sheet ***	15:53 CC AA
	Action: *Routing Notes Exist*	
	Doc ID: PRQSAR000013 Status: FYA/FRA Rt Requested Action: FYA/Approve Doc Summary: COPIER RENTAL FOR 4-1-00 THROUGH 8-31-00 Released: 03/27/2000 by: FONTAINE, FRAN F Attachments:	
	Requisition No: R000013 Contact Person: FRAN FONTANE Dept Name: FAMIS SERVICES Doc Total: 4,775.00 Untransf document summary	00
	PF4PF5PF6PF7PF8PF9PF10PF11 Exit NDoc Summ RHist Audit Notes Headr Items	PF12 Track +

3. Press <u>PF6</u> to view the document summary.

**************************************	ment Summary ****************
R000013	Number of Desc Lines: 5_ Page: 1_ Of 4
	DOC: R000013 USER REF: 297060-1 Shows number of pages to view
INVOICE TO:	SHIP TO:
FAMIS SERVICES	FAMIS SERVICES
TEXAS A&M UNIVERSITY SYSTEM	TEXAS A&M UNIVERSITY SYSTEM
JOHN B. CONNALLY BLDG - #440	JOHN B. CONNALLY BLDG - #440
301 TARROW	301 TARROW
COLLEGE STATION TX 77840-7896	COLLEGE STATION TX 77840-7896
	PF4=Exit PF7=Bck PF8=Fwrd

Screen 910 – Cover Sheet Document Summary, PF6 Summ

Screen 910 – Cover Sheet Window, PF6 Doc. Summary (cont'd)

	******	Document Sum	mary **********	*****
R0000	013	Number o	f Desc Lines: 5_	Page: 2_ Of 4
ITEM	DESCRIPTION	QUANTITY U	OM UNIT PRICE	XTENSION PRICE
1	Installation charge,	1.00 E 713-22-92100	A 0.0 -0	0 0.00
2	Xerox 1090, configur monthly rental rate included 75,000 copi 75,001 - 150,000 cop 150,001 - 200,000 co	5.00 M ation 12 clas (includes sup es/mo ies at \$.0042 pies at \$.000	0 955.0 sification j plies) 4 each 1 each	0 4,775.00
3	Removal charge, 713-	1.00 E 22-92300-4	A 0.0 Items Tota PF4=Exit	0 0.00 1 4,775.00 PF7=Bck PF8=Fwrd

Screen 910 – Cover Sheet Window, PF6 Doc. Summary (cont'd)

*********	** Document Summary ************	****
R000013	Number of Desc Lines: 5_	Page: 3_ Of 4
>> Account D	istribution <<	
SA 2000 297060-00000-58	10 FAMIS SERVICES	4,775.00
	Accounts Total	4,775.00
Catalogue Order: N		
	PF4=Exit PF	7=Bck PF8=Fwrd

Screen 910 – Cover Sheet Window, PF6 Doc. Summary (cont'd)



4. Key in your desired action – APP, REJ





 <u>Repeat steps 1 - 4</u> for additional documents or <u>press PF4 to exit</u> and return to Screen 910.

DETAILS FOR THE FAMIS SCREENS AND FIELD VALUES CAN BE FOUND IN A LATER SECTION OF THIS MANUAL

Section IV Electronic Office Basics Office Manager & Delegates Perspective

Electronic Office Managers and Delegates

Electronic Office Managers and Delegates are responsible for the set up and maintenance of the Routing & Approvals structure.

This functionality is ONLY available through the FAMIS screens; there is no equivalent in CANOPY.

Menu M91 - Electronic Office Management Menu

```
M91 Electronic Office Mgmt Menu
                                                                                            06/06/07 09:02
                                                                                              FY 2007 CC 02
  Screen:

* --- Departmental Functions ---- * * ----- Inquiry Functions ----- *
920 Dept View Create/Modify 945 Office Browse
924 Creator Desk Modify 935 Dept/SDept by Office
922 Approver Desk Create/Modify 936 Views by Office
923 Signer Desk Modify 937 Desks by Office
921 Dept Paths Create/Modify 938 Office/Desk Workload

    928 Dept View Delete
                                                          * -- Administrative Functions --- *
    930 Desk Copy
                                                          940 Office Create/Modify
                                                          941 Unit to Office Assignment
                                                           943 Security Signer Desk
  * ----- Special Functions ----- *
                                                           944 Office Delete
    925 Exec Paths Create/Modify
    926 Proc Paths Create/Modify
                                                           950 Electronic Documents Profiles
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
        Hmenu Help EHelp
```

One office manager and two delegates are assigned to each electronic office.

Responsibilities

- Creating electronic offices and adding / deleting valid departments
- Creating office views and adding / deleting valid departments
- Controlling the electronic signature authority by adding or deleting persons on the Signer Desk (office manager & security officers only)
- Creating, modifying and deleting approval-type desks
- Creating, modifying and deleting office paths

Some Members choose to divide the above responsibilities with the Security Officers doing the first two steps.

Electronic Offices

The Electronic Office provides the mechanism to efficiently manage the approval process. There are three levels of electronic offices: Department, Executive and Processing Office.

The first step in creating the Routing & Approvals structure is the setup of the electronic offices. The process involves giving the electronic office a title and description, identifying the electronic Office Manager, Delegates, and Default Signer, and attaching units (combinations of departments / subdepartments) to the office. Once the office is created and the departments are 'put into' or assigned to the office, the documents from those departments follow the structure and 'paths' of that electronic office. Department codes and the department table are integral components of Routing & Approvals.

Electronic Routing Views

A routing view if comprised of a unit or group of units that routes documents using a common set of creators and signers. With the ability to assign different signers based on document form, the need for different views has been diminished. But this step is still required to set up the electronic structure properly.

One routing view is required for each electronic office. Units (departments/ subdepts) are attached to the view, which indicates that these departments are valid within the view. If the office only has one unit assigned, then only one view is required.

Electronic Desks

Desks are electronic 'approval' or 'review' stations. A routing path is constructed by linking desks together in a linear fashion within an electronic office. People are 'put on' or assigned to a desk. There can be many persons on one desk and one person can be on many desks. There are three basic types of desks: Creator Desk, 'Approver' (review/approval) Desk and Signer Desk.

1. Creator Desk

The **Creator Desk** is a special desk that serves one main purpose: the people who are on this desk receive notification copies of document rejections. When a document is rejected, the reason becomes part of the document routing notes and the document is returned to the Inbox of the Creator. If the original creator is unavailable, all others listed on the Creator Desk can access the document information. This alleviates problems when the creator is not available and someone else must look at the document, review the rejection action required and take the appropriate action.

There are **no substitutes** on this desk.

2. Approver Desk

The second type of desk is an **Approver Desk** that can be added to a path for one of a variety of purposes. The desk can be used for a supervisor to review the work of the subordinate before passing the document on to the next desk in the path. The Executive and Processing Levels do not use Creator Desks or Signer Desks – ONLY Approver Desks are put in the respective paths.

3. Signer Desk

The **Signer Desk** is always the last desk in the Department path and is considered the official signoff on the accounts for the document. Because of the tie to fiscal responsibility the security on creating / updating the Signer Desk is more restrictive. Only the electronic Office Manager (on Screen 940) can change the Signer Desk (Screen 923), although the security officers serve as the backup and can use (Screen 943) a special screen to make changes to the Signer Desk.

Primary vs. Substitute on a Desk

A desk can have multiple primary and multiple substitutes assigned.

It is recommended that **ALL desks have** <u>at least two people</u> to avoid delays in advancing documents within Routing and Approvals.

Primary assignees all received the document in their respective Inboxes. When the first person takes action on the document, it 'goes out' of all Inboxes.

Substitute assignees do not receive the documents in their respective Inboxes, but must access the Inbox of the person for whom they are substituting in order to take action on the document.

Routing Paths

Each document follows a routing path. These paths are created by the Office Manager and Delegates based on the needs defined for the electronic office. These paths can go from **very simple to quite complex**.

There are different routing paths that can be defined for each of the Routing Levels (Department, Executive, Processing). There are different paths that can be defined based on document form (EPA, PLP, DBR, etc.). There are many variables in designing the routing paths.

The simplest path, for example, a Limited Purchasing document, consists of a Creator Desk and a Signer Desk. This satisfies the rule that two people must 'touch' the document.



In this example, Mary and Jim are on the creator desk and have rights and privileges to view documents that are rejected. Tom and Craig are primary signers and Janice is a substitute for them.

Next, we have added an approval desk to the path still within the Department level:



Now we have added a third desk that gives Sandy or Terry the opportunity to review / approve the documents along this path. Susie can substitute for Sandy or Terry for documents on this path. Note that Sandy or Terry may have other documents in their Inbox that are on a different path and or desk where Susie is not the substitute.

Routing Through Levels

Complex paths are often constructed to take advantage of the flexibility available. The path that an individual document takes may actually consist of multiple desks on multiple paths and across different levels depending on the particular document and its requirements for approval.

There are three possible levels to the routing structure: **Department Level**, **Executive Level** and **Processing Office**. The Electronic Documents Profile Screen 950 is the place where the these levels are set by FAMIS Services. While there may be exceptions, here are some common configurations.

Department:defines the lowest level of office; may be a single department, several
departments, or any grouping of departments and sub-departments
(units). By default all offices have Department responsibilities.

Routing through the **Department Level** always includes the department(s) of all the accounts that are on the document. If there are two accounts (belonging to two different departments), the document routes through one department and then the second department and so on until all departments/accounts are covered.

<u>Executive:</u>	defines a higher level of organization; for example, Vice President for Student Affairs which may have several Department offices reporting to it.
	Routing through the Executive Level allows for approval and review by a higher level of the organization. Departments are assigned to an executive level and then documents for that department will route through the executive structure.
Processing:	defines an office allowing for handling special processing for certain kinds of documents and is the final stage for these documents.
	Routing through the Processing Office Level allows documents such as EPA, DBR and Purchase Requisitions to receive additional processing. For example, for Purchasing, requisitions are 'processed' into Purchase Orders.

Document Forms and Routing Paths

Most types of documents begin in Department level routing. Purchasing documents - LP, EP and PRQ - begin in the department. The only document that only begins in the Processing Level is the Purchase Order (PO). Other documents use Department routing including EPA and DBR documents, but both of these documents CAN be initiated in the Processing Office as well.

Limited & Exempt Purchase Documents

A Purchasing document such as a **Limited or Exempt** will flow through Department paths and maybe on to an Executive Level path. Generally, these documents do not route through a Processing Office, although they can be set up to do so. After the Executive Level, routing is considered final for this type of document. The next step for these documents is Receiving and Payment.

DEPARTMENT LEVEL



Purchase Order Documents

Purchasing Orders always initiate in the Processing Office and do not require a Signer, although they do require an approval from the last desk in the Processing Office Path.

PROCESSING LEVEL



EPA and DBR Documents

These document forms generally flow through one or more Department paths, maybe through an Executive Level path, but always finish on a path in a Processing Office which 'value adds' and gives final approval for posting.

However, both of these documents can also be initiated in the Processing Office and not flow through the Department or Executive Levels.



Choices of Paths

Once a document is submitted to Routing and Approvals, there is the question of 'Where does it go?' or 'How does it know what path to take?'.

The document will find the path that is the best fit among the paths available. There is no simple answer here.

The accounts, adlocs and departments entered on the **document** are the first point in determining the routing path that will be followed. The FAMIS department table is key in the Routing structure. Therefore, all accounts and adlocs are required to have department codes attached.

Which Department(s)?

FAMIS verifies that the accounts, adlocs and departments on the document match the account / department / subdepartment (Screen 6) or adloc as seen on the adloc table in BPP (displayed on FAMIS Screen 861). The document routes through each of these departments.

Which Office and View?

Using each department, FAMIS then looks to see in which Electronic Office and View the department is valid for that department. (Screens 941 and 920)

Which Path?

FAMIS looks at the various paths established for that electronic office and, using the best fit concept, finds the best path for the document.

Is There An Executive Level For This Department?

Some departments may require routing through an Executive Level after completing Department routing. You can see the Electronic Office and Executive Level on the Department Table (Screen 860).

Is There A Processing Office Required For This Document?

Certain documents are required to route through a Processing Office after finishing routing in the Department Level and, if required, the Executive Level.

Basic Guidelines for Setting up Paths

Generally, these are the basic ways you can create a different path for documents (exceptions are noted):

Form or Document Type (like PLP, PRQ, EWR, DBR, etc.)

Depending on the **form** on the document, the document finds the appropriate path and follows it for approvals. The form is designated by three letters. For example, for PLP, the initial letter (P) indicates that this is a Purchasing document and the next two identify 'Limited' type. So, each **different form** can be set to go to a different path. An asterisk (*) in the form field means all forms. So, E** means all forms of EPA documents: EWR, EBR, and EGR.

This applies to all document types and all levels: Department, Executive and Processing Levels.

Department / Subdepartment (like INRE/FAMIS)

Depending on the codes for **department/subdept** on the document, the document finds the appropriate path and follows it for approvals. The department subdepartment combination used on the document can determine the path. For example, the documents for the department INRE with a blank (or no) subdepartment can be routed differently than INRE FAMIS combination.

This applies to all document types and at the Department and Executive Levels.

Category (like over \$ 10,000)

Different paths can be created for documents under/over a **dollar amount**. When documents require different routing based on a dollar amount, paths can be defined with an entry in the **category** field. Documents over the dollar amount stated in the category field follow that path for approval. For example, if 1000 is entered in the category field, the path is valid for documents whose total is equal to or greater than \$1000. This feature requires the entry of <u>whole dollar amounts</u> to work properly. Any other entry, while may be accepted on the screen, will NOT produce the desired results. *The category field is not available for entry in a path that contains an asterisk (*) in the Form: field on Screen 921.*

This is NOT available for EPA documents.

Guidelines by Document Type or Form

Purchasing Documents – PRQ, PLP, PEP, PPO



Department Routing (PRQ, PLP, PEP)

These purchasing documents route through:

• The department for each of the accounts on the purchase document

Executive Level Routing

Purchasing documents route through any Executive Level routing required by the department. Screen 941 shows whether a Department/Subdepartment are linked to Executive Level Routing.

Processing Level Routing

Once Department routing (and Executive, if appropriate) has been satisfied, the purchase requisitions (PRQ) route to the Purchasing Processing Office where they generally go to a Central Processing Desk. From here, a person decides which processing path is most appropriate for that document and routes it (using FYP) to the path using the name of the path.

EPA Documents – EBR. EWR, EGR



Department Routing

The EPA document routes through:

- The department of the Adloc of the current position as displayed on the Adloc Table (Screen 306) in BPP or FAMIS Screen 861.
- The department for each of the Funding Source Accounts
- The department for each of the Requirement Accounts

Executive Level Routing

The EPA document routes through any Executive Level routing required by the department. Screen 941 shows whether a Department/Subdepartment are linked to Executive Level Routing.

Processing Level Routing

The EPA document chooses its Processing Office path based on:

- the form (EBR, EWR, EGR)
- Adloc Screen 306 in BPP where the path name is stored in a field on that screen. This can be seen on FAMIS Screen 861. If blank, then it uses the next rule to determine the path.
- Monthly or Biweekly 'Payroll Indicator' field stored in BPP Values A-C are Monthly, everything else is Biweekly

The EPA document must be given the **final approval** in the Processing Office for the Budget Action to post in BPP.

DBR Documents DBR



Department Routing

The DBR document routes through:

• The department for each of the Funding Source Accounts

Executive Level Routing

The DBR document routes through any Executive Level routing required by the department. Screen 941 shows whether a Department/Subdepartment are linked to Executive Level Routing.

Processing Level Routing

Once Department routing (and Executive, if appropriate) has been satisfied, the DBR Processing Office path is automatically selected based on:

• If data is filled in, the DBR Processing Office Routing Path Table (Screen 529) provides a way to establish a link between the source accounts and the appropriate approval path in the DBR Processing Office. This screen is used to specify paths based on account ranges. Account ranges can be designated expense or revenue.

Justification codes can also be used to define the path using Screen 529. Some components define paths tied closely to the source account; others may choose to define paths based on the justification code.

If you choose to use Screen 529, 'name' the DBR path, then create the appropriate entry on this screen. To complete the work, you must then enter these DBR path names in the appropriate path field on the Processing Office Path Screen 926. Multiple entries can point to the same path.

• If no entries are made on the DBR Processing Office Routing Path Table (Screen 529) or a specific source account is not found, the default path on Routing and Approvals Processing Paths Screen 926 will be selected.

Special DBR Desk

A **special DBR Desk** is required in each Processing Office path and is unique to DBR processing. This desk is named the 'Pass-Thru Desk' (status 'P') and is established to capture any errors found in posting. The workers on this desk can see the errors and decide how to handle the items that route there.

Normally documents pass 'briefly' through this desk on their way to final approval. If a post fails, the document stays on the desk. Workers on this desk are able to:

(1) reject the document back to the department (posting failure cannot be / will not be corrected)

<u>OR</u>

(2) approve it. If approved from this desk, it tries to post again.

Posting errors occur for many reasons such as when budgets are no longer available, accounts or pools have been frozen or default banks are invalid. Once the document has posted, the approval is accepted and the document reaches Final status.

Special Revision Access

Special limited access to make changes to the original DBR document has been granted to approvers in the DBR Processing Office. As a primary (or substitute) on a Processing Office desk, you are able to modify the DBR document from the Inbox Document Coversheet. The Corrections PFKEY (PF12) allows you to modify the dollar amount, pool, or mandatory/non-mandatory flag on the DBR document

Section V Productivity Aids Inquiry

Aids for Management of the Routing Structures

List Approval Profile Screen 915	Lists a user approval profile that is all the desks a user is on – especially helpful for changes / deletes to access
Lists Offices Screen 945	Lists all the Electronic Offices ; indicates when office is an Executive or Processing Office
<i>Lists Units in Office</i> <i>Screen 935</i>	Lists Units (depts./subdepts valid for an Office
List Desks in Office Screen 937	Lists all the desks that are valid for an Office; a desk may or may not be active in a path
List Views by Office Screen 936	Lists all the valid views for an Office
Office/Desk Workload Screen 938	Lists documents in routing for an electronic office
Documents by Dept Screen 918	Lists documents in routing for a department
Person Table Screen 850	Lists people , their UIN and location information
Dept Table Screen 860	Lists all the department/subdepartments and the Electronic Office and Executive Level

Screen 915 displays all of the approval structures that a person is attached to within each campus code. Each office, desk and view is displayed along with the status of the person for that approval structure.

Screen 915 - Approval Profile by Name						
915 Approva	l Profile by	Name			11/17/10 15:02	
	WATSO	ON, WANDA W			CC 02	
Screen:	Name:					
Campus Cd	Office	Desk	Status	View		
02	PURCHASING	CREATE DSK		PURCHASING		
02	PURCHASING	CREATE PLP		PURCHASING		
02	GRAPHICS	CREATE DSK		VIEW01		
02	HUBS	CREATE DSK		HUBSVW		
02	MAIL	CREATE DSK		MAILVW		
02	LOGISTICS	CREATE DSK		LOGISTICS		
	** END OF F	RECORD LIST -	6 Record(s) Found		
Enter-PF1P	F2PF3PF	74PF5PF	6PF71	PF8PF9PF1	L0PF11PF12	
Hmenu H	elp EHelp					

The "View" field is only applicable to signer / creator desks.

Basic Steps

- Advance to Screen 915.
- Type the name of the person whose approval structure you wish to display on the Action Line and press <ENTER> to view all of the approval structures that the person is attached to within your campus code.
- Press <ENTER> to scroll through the listing.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

Name:

20 characters

Identify the <u>name of the person</u> whose approval profile you want to see. You can do a name search and select by entering an asterisk (*) in the Name: field and pressing <ENTER>.

Screen Information

Campus Cd:

2 digits Identifies the <u>campus code</u> for the TAMUS Member to which <u>the profile</u> <u>belongs</u>. This is especially useful when a person has approval authority with more than one TAMUS member.

Screen 915 – Approval Profile by Name (cont'd)

Office:	10 characters Displays the <u>title of the office</u> in which the person has approval authority.
Desk:	10 characters Identifies the <u>name of the desk</u> where the person has approval authority.
Status:	Help1 characterIndicate the status of how the document should go to the desk.Blank = ApprovalI = InformationN = Notification
View:	10 characters Displays the <u>name of the view</u> where a person has approval authority on a signer or creator desk. This is only applicable to signer/ creator desks.

Additional Information

PF Keys

See the Appendix for explanations of the standard PF Keys.

You can view a complete listing of all of the electronic offices that have been established for a campus code. This is accomplished using Screen 945 You may press the <ENTER> key to scroll to the next screen of office names.

Screen 945 -	Office	Browse
--------------	--------	--------

945 Office	945 Office Browse 06/06/07 16:19			
Screen:	Office:			
		Processing	Exec	
S Office	Description	View	View	Office Manager
				ADDIGON ALLEY A
_ A&M POLICE	TEXAS A&M UNIVERSITY POLICE D			ADDISON, ALLEY A WARDEN WENDY W
ACCTNG	ACCOUNTING			LANE. LEONA L
ADRC	OFFICE OF ADMISSIONS AND RECO			RALEY, RHONDA R
AECNCTR	CENTER FOR ACADEMIC ENHANCEME			NEIMANN, NANCE N
AEROSPACE	AEROSPACE ENGINEERING DEPT			GARLAND, GARY G
_ AG ECON	AGRICULTURAL ECONOMICS			DUNLAP, DIANE D
_ AGIS	ADMINISTRATIVE GEOGRAPHIC INF			MORRIS, MONTE M
_ AGRENGR	AGRICULTURAL ENGINEERING			DOWNS, DONALD D
_ AGRIED	AG EDUCATION			DOWNS, DONALD D
_ ANSCDEPT	ANIMAL SCIENCE			DOWNS, DONALD D
_ ANTH	ANTHROPOLOGY DEPARTMENT			HALEY, HARLAN H
_ APUPAS	ASSOC PROVOST FOR UNDERGRAD P			NEILEY, NONA N
_ ARCHOO	COLLEGE OF ARCHITECTURE ACCOU			GREER, GARY G
	More Entries - Press <ente< td=""><td>R> to contin</td><td>nue</td><td></td></ente<>	R> to contin	nue	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12				
Hmenu H	elp EHelp			

Basic Steps

- Advance to Screen 945.
- Press <ENTER> to scroll through the list of offices for a particular campus code.
- To position a particular office at the top of list of electronic offices, enter the name on the Action Line and press <ENTER>.

Explanation of Browsing Process

Selecting an Office

If the office name is not known, press <ENTER> to display an alphabetical list of all available offices. Continue pressing <ENTER> to scroll through the list. However, If you know the office name, type it in the Office: field on the Action Line and press <ENTER> to position it at the top of the list.

To select an office, move your cursor to the desired line and press <ENTER>. The office name will then be placed in the Office: field on the Action Line and may be used in context to other screens.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u> Office:	10 characters Identify the <u>office to be positioned at the top of the screen</u> .
<u>Screen Information</u> Office:	10 characters Indicates the <u>short name for</u> the <u>electronic office</u> displayed.
Description:	36 characters Displays the <u>description for the office</u> listed.
Processing View:	10 characters Shows the <u>name of the processing view desk</u> .
Exec View:	4 characters Shows the word "EXEC" if the department/subdepartment is assigned to an <u>executive office</u> .
Manager:	30 characters Indicates the <u>name of the electronic office manager</u> for the office.

Additional Functions

PF KEYS

See the Appendix for an explanation of the standard PF Keys.

Departments/Subdepartments in an Office

Each electronic office is a structure made up of departments and subdepartments (collectively called 'units'). With Screen 935 you can see which departments and subdepartments are assigned to a particular electronic office.

	Screen	935 -	Dept	/SDept	: bv	Office
--	--------	-------	------	--------	------	--------

935 Dept/SDept by Office 06/06/07 16:1					
		CC 02			
Screen: Office: FISCAL					
	Link				
S Dept Sub-Dept Description	Туре	View			
_ FISC FINANCIAL MANAGEMENT OPE	RATIONS D	PIPVIEW			
_ FISC AAR FMO - ADMIN ACCOUNTING/R	EPORTING D	AARVIEW			
_ FISC AC FMO ACCOUNTING CONTROL	D	ACVIEW			
_ FISC ACCTG FINANCIAL MANAGEMENT SVC	S - ACCOUNTING D	OPERATIONS			
_ FISC APS FMO - ACCOUNTING PROCESS	ING D	APSVIEW			
_ FISC EPAY FINANCIAL MANAGEMENT OPE	RATIONS - EPAY D	EPAYVIEW			
_ FISC FMO FINANCIAL MANAGEMENT OPE	RATIONS D	FMOVIEW			
_ FISC OPS FMO - ACCOUNTING OPERATI	ONS D	OPERATIONS			
<pre>** End of Record List - 8 Record(s</pre>) Found				
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12					
Hmenu Help EHelp p					

Basic Steps

- Advance to Screen 935.
- Type the name of your electronic office on the Action Line.
- Press <ENTER> to display all of the units within your office.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

<u>A</u>	LION LINE	
•	Office:	10 characters Identify the <u>name of the office</u> whose departments/subdepartments you wish to view.
<u>Sci</u>	reen Information	
	Dept:	10 characters
		Indicates the <u>names of the departments</u> within the office.
	Sub-Dept:	10 characters
		Displays the <u>name of the subdepartment</u> within the department.
	Description:	40 characters
		Identifies the description given to the unit (department/subdepartment
		combination).

Link Type:	1 character Indicates the <u>type of view</u> displayed: <u>D</u> (departmental) <u>E</u> (executive) or <u>P</u> (processing) view.
View:	10 characters/digits Indicates the <u>name of the view</u> that the dept/sub-dept is in.

Additional Functions

PF KEYS See the Appendix for an explanation of the standard PF Keys.

List Views in an Office

A "Department" view consists of a set of units whose documents route to the same Signer Desk. Documents for this office may pass through different approver desks, but always end Department routing at the same Signer Desk.

At least one	Department \	view is re	quired for	all electroni	c offices

Screen 936 displays a list of all the views that have been created for a single electronic office.

Screen 936 -Views by Office

936 Views by	06/06/07 16:18 CC 02				
Screen:	Office: PURCHASING View:		00 01		
S View Name	View Description	Nbr Units I	ype		
_ PURCHASING	PURCHASING SERVICES	3	D		
_ PURS	PURCHASING/STORES PROCESSING PATHS		P		
_ PURS/WRHS	MATERIALS SERVICES HOLDING AREA WAREHOUS	1	D		
	** End of Record List - 3 Record(s) Found	1 1			
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12					
Hmenu Hel	p EHelp				

Basic Steps

- Advance to Screen 936.
- Type the name of your electronic office on the Action Line.
- Press <ENTER> to display a list of all of the Department views for your office.

Explanation Of Browsing Process

Selecting a View

To select a view, move the cursor to the desired line and press <ENTER>. The view name will be placed in the View: field on the Action Line and may be moved in context to other screens.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line

• Office:

10 characters

Indicate the <u>title of the office</u> for which you want to see the names of all the valid views.
Screen 936 – Views by Office (cont'd)

View:	10 characters Identify the <u>view</u> you wish to <u>position at the top of the screen</u> .
<u>Screen Information</u> View Name:	10 characters Displays the <u>name(s) of the views</u> within the electronic office listed in alphabetical order.
View Description:	10 characters Shows text <u>description</u> each <u>of the views</u> .
Nbr Units:	9 digits Identifies of the <u>number of units</u> assigned to the view.
Туре:	1 character Indicates the <u>type of view displayed</u> . D (departmental) , E (executive), and P (processing).
Additional Functions PF KEYS	See the Appendix for an explanation of the standard PF Keys.

List Desks in an Office

As documents pass through routing and approval, they are sent to desks, called approval or Signer Desks. Persons designated in the departments as 'approvers' and 'signers' are attached to these desks and can see or take action on the documents that come to a desk that they are on.

To display a list of the approval desks that have been created for an office, use Screen 937.

Since all **Departmen**t paths have Signer Desk, these are not listed on this screen.

Screen 937 - Desks by Office

937 Desks by Office 06/06/07 16:17						
CC 02						
Screen: Office: PURC	HASING Desk:					
S Desk View	Description					
ADMIN	ADMINISTRATIVE DIRECTOR DESK					
ADMIN-B2	ADMINSTRATIVE ASSOC DIRECTOR PP & IT					
ADMIN-B3	ADMINISTRATIVE POLICY & TRAINING					
ADMIN-B4	ADMINISTRATIVE ASSOC DIRECTOR OP & SC/FS					
ADMIN-B5	ADMINISTRATIVE ASSOC DIRECTOR E-COMMERCE					
_ ADMIN-C1	ADMIN-C1 ADMINISTRATIVE SUPPORT 1					
_ ADMIN-C2	ADMINISTRATIVE CLERK 2					
ADMIN-C3	ADMINISTRATIVE SUPPORT 3					
ADMIN-C4	ADMINISTRATIVE SUPPORT FOR ASSOC DIRECTOR					
ADMIN-C5	CLERICAL SUPPORT					
ADMIN-EXEC	EXECUTIVE DIRECTOR					
APPROVE	ACCOUNTANT APPROVER DESK					
APPROVER	APPROVER FOR EMAP REQUISITIONS					
CENTRLDESK	CENTRAL PROCESSING DESK					
More Entries - Press <enter -="" continue<="" td="" to=""></enter>						
Enter-PF1PF2PF3PF4	Enter-PF1PF2PF3PF4PF5PF6PF8PF9PF10PF11PF12					
Hmenu Help EHelp	Names					

Basic Steps

- Advance to Screen 937.
- Type the name of a desk on the Action Line to position it at the top of the list and press <ENTER> to display a list of all of the desks within an office.
- Press PF7 to display a list of desk assignees.

Explanation of Browsing Process

Listing Names

The names of the desk assignees may be displayed by moving the cursor to a desk line and pressing PF7. This will initiate a pop-up window with the names and statuses of the assignees for that desk. See the Appendix for a more details.

Selecting a Desk

To select a desk, move the cursor to the desired line and press <ENTER>. The desk name will then be moved to the Desk: field in the Action Line and may be moved in context to other screens.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line	
• Office:	10 characters Indicate the <u>title of the electronic office</u> whose desks you wish to view.
Desk:	10 characters Identify the <u>name of the desk to position at the top</u> of the screen.
Screen Information	
Desk:	10 characters Indicates the <u>name(s) of the desks created under the office</u> ; listed in alphabetical order.
View:	10 characters Shows the name of the <u>desk view</u> .
Description:	60 characters Displays <u>text describing the desks</u> within the office.
Additional Function	<u>15</u>
PF KEYS	See the Appendix for an explanation of the standard PF Keys.
PF7	Names of Desk Assignees
Names	Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor is anywhere on a desk line.

The Office/Desk Workload Screen displays all the documents currently routed to desks in the electronic office.

The office manager can list the documents on all desks or filter the list for a specific desk. The Desk and Form fields can be used to filter the display of documents shown on the screen. For example, if you type "PRQ" in the Form field on the Action Line, the screen will display all the requisition documents in the Inboxes.

Only the office manager and delegates can view this information.

Screen 938 - Office/Desk Workload (Panel 1)

938 Office/Desk Workload 06/06/07 16:04				
Screen: Office: PURCHASING Desk: Form:				
	PANEL: 01MORE>>			
	Requested			
Document ID N Doc Summary	Action Status			
PP002P602188 SANTA CHIARA ITALY CENTER SERVICES FY	Approve In Proc Rt			
PLP02A734236 FREIGHT	Approve In Dept Rt			
PLP02A735148 OFF CAMPUS PRINTING	Approve In Dept Rt			
PLP02A735151 OFF CAMPUS PRINTING	Approve In Dept Rt			
PLP02A735242 INTERIORSCAPE MAINTENANCE	Approve In Dept Rt			
PRQ02R800153 * BLANKET-ORTRONICS (NOYNAERT-M700192)	Approve In Proc Rt			
PRQ02R800156 FIBER PATCH CABLE (NOYNAERT- M700060)	Approve In Proc Rt			
PRQ02R800155 BLANKET-FLEXTRAY (NOYNAERT-M700367) R	Approve In Proc Rt			
PRQ02R800157 BLANKET-MISC PRODUCT LINES (NOYNAERT-	Approve In Proc Rt			
PRQ02R800158 BLANKET- MISC PRODUCT LINES (NOYNAERT	Approve In Proc Rt			
PRQ02R800154 * BLANKET-ORTRONICS (NOYNAERT-M700112)	Approve In Proc Rt			
PRQ02R703900 ZOOM LENS' FOR PROJECTORS IN ROOM 115	Approve In Proc Rt			
*** Press ENTER to view more documents ***				
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12				
Hmenu Help EHelp RHist	Left Right			

Screen 938 - Office/Desk Workload (Panel 2)

938 Office/De	sk Work	cload				0	6/06/07 16:05
CC 02						CC 02	
Screen: Office: PURCHASING Desk: Form:							
	< <mor< td=""><td>RE</td><td></td><td></td><td>PA</td><td>NEL: 0</td><td>2MORE>></td></mor<>	RE			PA	NEL: 0	2MORE>>
Document ID	FY	Cre	ator	Created	Arrived	Davs	User's Level
PP002P602188	2006 L	YLES,	LORNA L	02/20/2006	02/21/2006	470	Approver
PLP02A734236	2007 W	NOMAK,	WESLEY W	06/01/2007	06/01/2007	5	Approver
PLP02A735148	2007 W	NOMAK,	WESLEY W	06/05/2007	06/05/2007	1	Approver
PLP02A735151	2007 W	NOMAK,	WESLEY W	06/05/2007	06/05/2007	1	Approver
PLP02A735242	2007 W	NOMAK,	WESLEY W	06/05/2007	06/05/2007	1	Approver
PRQ02R800153	2008 H	HALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R800156	2008 H	HALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R800155	2008 H	HALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R800157	2008 H	IALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R800158	2008 H	IALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R800154	2008 H	HALEY,	HOLLY H	06/04/2007	06/06/2007		Approver
PRQ02R703900	2007 C	CIELY,	CARLA C	06/05/2007	06/06/2007		Approver
*** Press ENTER to view more documents ***							
Enter-PF1PF2	PF3-	PF4-	PF5PF6	5PF7PF	78PF91	PF10	PF11PF12
Hmenu Helj	p EHel	lp			1	Left 1	Right

0010011900 01		i o naoda	(Function)				
938 Office/Desk	workload				06/06/07	16:05	
Screen: Off	Eice: PURCHAS	ING Desk:	Fo	rm:			
	< <more< td=""><td></td><td></td><td>PANEL:</td><td>03</td><td></td></more<>			PANEL:	03		
		Cui	rrent				
Document ID C	CC Unit	Office	Desk	View			
PP002P602188 ()2	PURCHASING	ADMIN	PURS			
PLP02A734236 0	2 PURS	PURCHASING	APPROVE	PURCHASING			
PLP02A735148 0)2 PURS	PURCHASING	APPROVE	PURCHASING			
PLP02A735151 0	2 PURS	PURCHASING	APPROVE	PURCHASING			
PLP02A735242 (2 PURS	PURCHASING	APPROVE	PURCHASING			
PRQ02R800153 0)2	PURCHASING	CENTRLDESK	PURS			
PRQ02R800156 0)2	PURCHASING	CENTRLDESK	PURS			
PRQ02R800155 0)2	PURCHASING	CENTRLDESK	PURS			
PRQ02R800157 ()2	PURCHASING	CENTRLDESK	PURS			
PRQ02R800158 0)2	PURCHASING	CENTRLDESK	PURS			
PRQ02R800154 0)2	PURCHASING	CENTRLDESK	PURS			
PRQ02R703900 0)2	PURCHASING	CENTRLDESK	PURS			
*** Press	ENTER to vie	w more docum	***				
Enter-PF1PF2	Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12						
Hmenu Help	EHelp		Names	Left	Right		

Screen 938 - Office/Desk Workload (Panel 3)

Basic Steps

- Advance to Screen 938.
- Type the name of an electronic office and desk, if desired, on the Action Line.
- Press <ENTER> to display all of the documents currently routed to the selected office/desk.
- Use the PF Keys to scroll between panels in order to access additional information.
- Press PF7 to view desk assignees.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line ◆ Office:	10 characters Indicate the <u>title of the office</u> governing the documents awaiting action.
Desk:	10 characters Identify the <u>name of the desk</u> housing the documents awaiting action.
Form:	Help 3 characters Indicate the <u>type of document</u> to be displayed.
Screen Information	

```
Panel 1
```

Document ID:12 characters/digitsDisplays the document identification number used in routing and approval;
consists of Form (3 characters), Campus Code (2 characters), and the Document
Number (7 characters).

N:	1 character An '*' indicates that <u>routing notes</u> are <u>attached</u> to the document.					
Doc Summary:	40 characters Displays a <u>short description of the document</u> .					
Requested Action:	11 characters Identifies the <u>action</u> that needs to be taken on the document.					
Status:	14 charactersShows a document's progress through the routing and approval system. Validvalues are:Blank =In ProcessCN =CancelledCO =CompletedDR =In Dept routingER =In Exec routingFN =FinalFY =FYA/FRA routingPR =In Proc routingRC =RecalledRJ =Rejected					
Panel 2 FY:	4 digits Indicates the <u>fiscal year</u> in which the document was created.					
Creator:	18 characters Identifies the <u>person who created</u> and sent the <u>document</u> into the routing and approval system.					
Created:	8 digits Represents the <u>date the document was created</u> .					
Arrived:	8 digits Indicates the <u>date the document arrived</u> at its current office/desk.					
Days:	5 digits Represents the <u>number of days</u> that the document has been <u>located at its</u> <u>current office/desk</u> .					
User's Level:	12 characters Indicates the <u>type of user</u> (i.e. their level) in whose Inbox the document is located.					
Panel 3						
Current						
CC:	2 characters/digits Displays the <u>campus code</u> to which the document has currently been routed.					

Screen 938 – Office/Desk Workload (cont'd)

Unit:	10 characters
	Identifies the <u>unit</u> to which the document has <u>currently</u> been <u>routed</u> .
Office:	10 characters
	Indicates the office at which the document is currently located.
Desk:	10 characters/digits
	Represents the <u>desk</u> at which the document is <u>currently located</u> .
Additional Functions	
PF KEYS	See the Appendix for explanations of the standard PF Keys.
PF7	Routing History
RHist	Shows the <u>routing information</u> for the document.
PF7	Names of Desk Assignees
Names	Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor is anywhere on a desk line
	is anywhere on a desk line.

You may use Screen 918 to access routing documents by department. If you wish to include finished documents in the list displayed, type 'Y' in the Finished: field on the Action Line.

There are two panels to this screen. Press PF11 to scroll right and view additional information for the documents displayed. Use the PF keys at the bottom of the screen to review routing history, cover sheet information, and notes.

Screen 918 -	 Documents 	by Department	(Panel 1)
--------------	-------------------------------	---------------	-----------

918 Documents by Department	11/17/10 14:23				
	CC AM				
Screen: Dept: PURS_ SubDept:	Form: Finished: N				
	PANEL: 01MORE>>				
Sel Document ID N Creator	Doc Summary				
_ PLPAML700600 * YOUNG, YOLANDA Y	OFFICE SUPPLIES				
_ PLPAML800461 * YOUNG, YOLANDA Y	BOOKS, FOR GRAD LAB				
_ PLPAML800615 * YOUNG, YOLANDA Y	SHADE, IR/UV ABSORBING GLASS				
_ PLPAML800616 * YOUNG, YOLANDA Y	MODULATOR, REG PULSE 16 DIP				
PLPAML800617 * YOUNG, YOLANDA Y	FILTER, BAND PASS 2"				
PLPAML800618 YOUNG, YOLANDA Y	CAMERA, OPTICAL CHOPPER				
PLPAML900195 * YOUNG, YOLANDA Y	SOFTWARE				
PLPAML900196 * YOUNG, YOLANDA Y	CAMERA OPTICAL CHOPPER C995				
PROAMR001501 * YOUNG, YOLANDA Y	FURNITURE FOR CLASS ON 10-6-09				
PRQAMR001502 YOUNG, YOLANDA Y	FURNITURE 10-6-2009 #1				
PRQAMR001503 OWEN, OTHELLA O	FURNITURE 10/6/2009				
PRQAMR001508 * YOUNG, YOLANDA Y	FURNITURE 10-6-2009 #2				
*** PRESS ENTER TO VIEW MORE DOCUMENTS ***					
Enter-PF1PF2PF3PF4PF5PF6	-PF7PF8PF9PF10PF11PF12				
Hmenu Help EHelp	RHist Cover Notes Left Right				

Screen 918 – Documents by Department (Panel 2)

918 Documents by Department 11/17/10 14:24						
						CC AM
SC	reen: De	ept: PURS_ SubI	ept: _	Form: _	Finished: N	
	<	<more< td=""><td></td><td></td><td>PANEL: 02</td><td></td></more<>			PANEL: 02	
Sel	Document ID	Form Name	FY	Status	Created SubDep	pt
_	PLPAML700600	LIMITED PRCH	2007	In Dept Rt	06/02/2010	
_	PLPAML800461	LIMITED PRCH	2008	In Dept Rt	10/02/2008	
_	PLPAML800615	LIMITED PRCH	2008	Rejected	11/05/2008	
_	PLPAML800616	LIMITED PRCH	2008	Rejected	11/05/2008	
_	PLPAML800617	LIMITED PRCH	2008	In Dept Rt	01/07/2009	
	PLPAML800618	LIMITED PRCH	2008	In Dept Rt	07/29/2008	
	PLPAML900195	LIMITED PRCH	2009	Rejected	06/01/2010	
_	PLPAML900196	LIMITED PRCH	2009	Rejected	06/01/2010	
_	PROAMR001501	REOUISITION	2010	In Dept Rt	10/06/2009	
_	PROAMR001502	REQUISITION	2010	In Dept Rt	10/06/2009	
_	PROAMR001503	REQUISITION	2010	In Dept Rt	10/06/2009	
_	PROAMR001508	REQUISITION	2010	In Dept Rt	10/06/2009	
_						
	*** PRESS	ENTER TO VIEW MC	RE DOC	UMENTS ***		
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12						
	Hmenu Help	EHelp	-	RHist Cover	Notes Left Right	

Basic Steps

- Advance to Screen 918.
- Type a valid department on the Action Line.
- Include subdepartment and form type to narrow the search and display list.
- Enter 'Y' in the Finished: field if you wish to include finished documents in the list displayed.
- Press <ENTER> to display a list of documents for the specified department.
- Type an 'X' next to the document you wish to select.
- Press the PF Keys, as desired, to obtain detailed information about the documents.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

Action Line

•	Dept:	5 characters Indicate the <u>department code</u> to view deleted documents.	
	SubDept:	5 characters Identify a <u>sub-department code</u> , if needed.	
	Form:	Help 3 characters Specify the <u>type of document</u> to be displayed, if desired.	
	Finished:	1 character Type 'Y' to <u>include documents</u> that have successfully <u>completed the routing</u> <u>process</u> .	
<u>Sci</u> Pa	r <u>een Information</u> nel 1		
	Sel:	1 character Type an 'X' to <u>select</u> a <u>document</u> .	
	Document ID:	12 characters/digits	

	Displays the <u>document identification number</u> used in Routing and Approval, which consists of the form (3 characters) + campus code (2 digits) + document number (7 character/digits).
N:	1 character An asterisk (*) indicates <u>routing notes are attached to the document</u> .
Creator:	14 characters Displays the <u>name of the person who submitted the document</u> for Routing and Approval.
Doc Summary:	30 characters Displays a <u>summary description</u> taken from the original document.

Panel 2		
Form Name:	12 characters	
	Shows the type of purchasing document displayed.	
FY:	4 digits	
	Indicates the fiscal year in which the document was processed.	
e		
Status:	15 characters	
	Dentines the <u>status of the document</u> :	
	Blank = In Process	
	CN = Campleted	
	CO = Completed	
	EP = In Evec routing	
	EN - Final	
	FIN = FIIIdI FV = FVA/FPA routing	
	PP = In Proc routing	
	PC - Recalled	
	RC - Rejected	
	NJ – Nejecieu	
Created:	8 digits	
cicatea.	Displays the date the document was created and submitted to Routing and	
	Approval.	
	, pprovail	
Sub Dept:	5 characters	
	Indicates the sub-department code of the unit on the document.	
Additional Functions		
PF KEYS	See the Appendix for explanations of the standard PE Keys.	
	see the Appendix for explanations of the standard FT keys.	
PF7	Routing History	
RHist	Displays routing history of the document. See Screen 914.	
PF8	Cover Sheet	
Cover	Displays cover sheet information and gives access to document browse pop-	
	ups.	
PF9	Notes	
Notes	Used to display <u>routing notes</u> for the selected document.	

Person File

The FAMIS person file is built through two mechanisms:

- Manual entry on Screen 850, as seen below.
- Through an upload (ZBAU610) of a BPP file that contains records of persons paid through the TAMUS payroll system. Budgeted personnel are generally included as well as anyone paid through a restricted account.

FAMIS security cannot be established for a person unless they have a record on the person file. If a person's name does not display in the file, you may enter the record using this screen.

This screen is <u>updated and maintained by each campus</u>. The information is available to all TAMUS members and is not campus specific.

Screen 850 – FRS Person Information

850 Person Information	01/23/09 15:34 CC 02	
Screen: Person: 4uuuuuuu2 Inactive: _ De	lete: _ (Y/N)	
Person's Name: (Last) CARSON (First) COLLEEN (M	I) C (Suffix) (Prefix)	
SSN: 4ss-ss-sss4 Title Code: 8185 ANALYST		
Phone: 979-458-9999 Date Hired: 07/08/2004	Gender: F	
FAX: 979-458-8888 Adloc Part: 01 Acct: 271030	Suffix:	
BPP phone: 979-458-9898		
Home CC Dept S-Dept Address: FAMIS SERVICES 01 INRE_ FAMIS 200 TECHNOLOGY WAY #2180	Mail Cd: C1144	
City, COLLEGE STATION State: TY		
City: Commede Biarion Beace: in		
	- Pouting Email Brofg	
	KOUCING EMAIL FIELS	
DI/Decomphane Empil from PDD: N	Notifu Eroga	
FI/Researcher: _ Email from BPP: N Notify Freq: _		
E-mail: ccarsonwcanu.edu Type: N N		
Princer Delauit: Volded Apps: N N		
Enter-PF1PF2PF3PF3PF3PF3PF10PF11PF12		
Hmenu Help EHelp		

Basic Steps

- Advance to Screen 850.
- Enter a valid Universal Identification Number (UIN) or last name to locate the desired person's information. You may also type an asterisk (*) in this field to view a pop-up display of matching names from which to select.
- Press <ENTER> to view or record the information.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

• Person:

Help 9 digits

Enter the person's <u>Universal Identification Number</u>. You may also type an asterisk (*) to search for a name.

Screen 850 – Person Information (cont'd)

Inactive:	1 character Type 'Y' to <u>make the selected person</u> inactive.
	This field can only be set by security officers.
Delete (Y/N):	1 character Type 'Y' to <u>delete the person's record from the person file</u> .
Screen Information	
(Last):	20 characters Identify the person's <u>last name</u> .
(First):	10 characters Enter the person's <u>first name</u> .
(MI):	1 character Include the person's <u>middle initial</u> , if any.
(Suffix):	4 characters Provide the <u>suffix of the person</u> , if any.
(Prefix):	4 characters Enter the <u>prefix</u> of the person, if any.
SSN:	9 digits Displays the <u>Social Security number</u> .
Title Code:	Help 4 digits Provides the person's <u>title code</u> as provided by TAMUS.
Phone:	10 digits Enter the <u>phone number</u> of the person.
Date Hired:	8 digits Include the <u>date the person began working for The Texas A&M University</u> <u>System</u> .
Gender:	1 digit Displays the <u>gender</u> of the person.
FAX:	10 digits Provide the person's <u>FAX number</u> , if desired.
Adloc Part:	Help 2 digits Enter the <u>adloc (administrative location)</u> for the person.
Acct:	6 digits Identify the <u>account number</u> from which the person is paid.

Screen 850 – Person File (cont'd)

Suffix:	1 character/digit Enter a code, if needed, to further separate the Adloc.
BPP phone:	10 digits Shows the <u>phone number listed in BPP</u> .
Home CC:	Help 2 digits Include the <u>home campus code</u> of the person.
Dept:	5 digits Show the <u>department</u> the person works in.
Sub-Dept:	5 digits Enter the <u>sub-department</u> the person works in.
Address:	3 lines (30 characters/digits each) Include the <u>business address</u> of the person.
Mail Code:	Help 4 digits Enter the <u>on campus mail code</u> of the person.
City:	30 characters Shows the <u>city</u> where the department is <u>located</u> .
State:	Help 2 characters Displays <u>state</u> where department is <u>located</u> .
Zip:	9 digits Provides the department's <u>zip code + 4 digits</u> .
Country:	Help 3 characters Include the <u>country</u> of the person.
PI/Researcher:	1 digit Indicate if person is a <u>researcher or principal investigator</u> .
E-mail from BPP:	1 character Indicate ('Y' or 'N') if <u>email address</u> was obtained <u>from the BPP employees file</u> .
Inbox Notify Frequency:	1 character Enter <u>frequency of</u> the person's <u>inbox notification</u> . D = Daily E = Every Document W = Weekly
Туре:	1 character Indicates <u>email notification type</u> : A = Approvals Only N = None (no email) Y = All (include notifications)

Screen 850 - Person File (cont'd)

E-Mail:	30 characters Identify the <u>E-mail address</u> of the person.
Printer Default:	30 characters Enter the <u>default printer</u> to receive reports.

Additional Functions

PF KEYS See the Appendix for explanations of the standard PF Keys.

Department Table

FAMIS provides a table of valid departments for each campus. These department codes are used extensively throughout FAMIS. Both FRS and FFX modules utilize this table.

This table is not fiscal year dependent--any changes you make will affect any open year.

Screen 860 is used to add a new department to FAMIS by authorized personnel. You can also modify information on existing departments and expire a department to make it inactive. Departments cannot be deleted. Also note that:

- <u>School/College</u> *This is the only screen where you can update this field.* It will not be a protected field for anyone who has update access to the screen. The School/College: field is also protected if you are trying to modify it on a sub-department. Remove it from the department and all its sub-departments by taking the college off of the department (FISA or FISC). The change will ripple to all of the sub-departments.
- <u>EPA Allow Flag</u> controls the creation on EPA documents and was added for Form 500 processing. Entering 'Y' allows the department to create EPA documents, which will be routed through the department. If the flag is off ('N' or blank), you will still be able to view payroll data in CANOPY, provided you have the appropriate security clearance to do so.
- **<u>Purchasing Trn Flag</u>** if not set to 'Y' on this screen, FAMIS does not recognize that routing of purchasing documents exists for the department.
- <u>Exec Level</u> a code that can be used as a sort field by many of our reports to group all accounts that report to a specific level (such as a report of all accounts for a Vice President). The values are campus specific so each campus assigns their own values.

This screen is <u>maintained and updated by each campus</u>. *The information is campus specific.*

860 Department Table	Maintenance	07/09/09 10:2
		CC 0:
Screen: Depart	ment: CHEM_ Sub Dept:	
Dept Name:	CHEMISTRY	
Head/Director ID:	4uuuuuuu8 Alt APO ID:	6uuuuuuu4
	REYNOLDS, RENE	CASH, CONNIE
Head/Director Phone:	979-845-3333 Alt APO Phone:	979-845-2222
Mail Code:	C3255 Building Number:	00484
Exec Level:	AA Building Campus:	02
Division:	CD Room:	
School/College:	SC Group Cd:	·
Off Campus Flag:	N Other Loc:	
Budget Sort Dept Nbr:	Approx. Inv. Count:	
Allow Flags: FRS:	Y EPA: Y DBR: Y DCR: Y SciQuest	: _ FFX: Y TDP: _
Purch Trn Flag:	Y FFX Cert. Month:	2_ Surplus: _
Maestro: Org Unit:	8464 Parent Dept: C	enter/Institute:
Chemistry	Mail to Dept Head:	
Other Part Nbr:	Dept Office: CHEMISTRY	General Comments:
Other Part Dept:	Dept View: CHEMISTRY	Hit <pf10></pf10>
Other Part Sub Dept:	Exec Office:	FFX Comments:
Dept Expiration Date:	Exec View:	Hit <pf11></pf11>
Enter-PF1PF2PF3	+PF4PF5PF6PF7PF8PF9-	PF10PF11PF12
Hmenu Help EHe	p Audit Dloa	d GenCm FFXCm

Screen 860 – Department Table Maintenance

Basic Steps

- Advance to Screen 860.
- Enter a department code on the Action Line, and Sub Department if needed. You may also type an asterisk (*) in the Department: field to see a list of departments and subdepartments.
- If the department is not listed in the pop-up box, type an "i" in the TYPE: field to search by Department ID. This will allow you to find what you are searching for if it is an active department subdepartment.
- Press <ENTER> to view the information.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Ас</u>	<u>tion Line</u>	
•	Department:	Help 5 characters
		Enter a valid <u>department code</u> .
	Sub Dept:	5 characters
		Enter the <u>sub-department</u> , if needed.
Sci	reen Information	
	Dept Name:	50 characters
		Enter the <u>full name of the department</u> .
•	Head/Director ID:	9 digits
		Provide the Universal Identification Number (UIN) of the department head or
		director. The name will be displayed when you press <enter>.</enter>
	Alt APO ID:	9 digits
		Enter the UIN of the <u>alternate APO (accountable property officer)</u> .
	Head/Director	10 digits
	Phone:	Indicate the <u>phone number of the head/director</u> of the department.
	Alt APO Phone:	10 digits
		Provide the phone number of the alternate APO.
	Mail Code:	Help 5 characters/digits
		Enter the <u>mail code</u> for the department.
	Building Number:	5 digits
		Identify the department's building number.
	Exec Level:	Help 2 character
		Include the <u>executive level of</u> the <u>department</u> .
	Building Campus:	2 digits
		Identify the campus code for the building.

Screen 860 – Department Table Maintenance (cont'd)

Division:	2 character Provide <u>division code</u> reflecting the structure of the campus.
Room:	6 digits Enter <u>room number or the floor number</u> of the department.
School/College:	Help 2 characters Provide the <u>level of organizational structure</u> .
Group Cd:	5 characters Include the group code for the department. Used for grouping departments together for special purposes, perhaps security or reporting.
Off Campus Flag:	1 character Enter 'Y' if department is <u>located off campus</u> .
Other Loc:	20 characters Type 'Y' if the department is <u>located in more than one location</u> .
Budget Sort Dept Nbr:	4 characters Used for <u>AL-RSCH budget sort number</u> .
Approx. Inv. Count:	6 characters Enter the <u>approximate inventory numbers</u> .
Allow Flags FRS:	1 character Enter 'Y' to Indicate this <u>department is valid for accounting in FRS</u> .
EPA:	1 character Enter 'Y' if the <u>department is allowed to create EPA documents</u> .
DBR:	1 character Type 'Y' if the <u>department</u> is <u>allowed to create Departmental Budget Records</u> .
DCR:	1 character Enter 'Y' to identify that the department is <u>allowed to create Departmental</u> <u>Correction Requests</u> .
SciQuest:	1 character Type 'Y' to identify this department is using the <u>SciQuest application</u> .
FFX:	1 character Enter 'Y' to indicate this department is <u>valid for asset control in FFX</u> .
TDP:	2 digits Enter 'Y' if the department is allowed to create TDP (asset transfer) documents

Screen 860 – Department Table Maintenance (cont'd)

Purch Trn Flag:	1 character Type 'Y' to identify this <u>department has been fully trained and is ready to use</u> <u>the Purchasing system</u> .
FFX Cert Month:	2 digits Indicate the <u>month for inventory certification</u> for this department.
Surplus:	1 character Enter 'Y' if this is an <u>inventory surplus department</u> for TDP routing.
Maestro	
Org Unit:	10 digits Identify the <u>number of</u> the <u>organization unit</u> (as determined by TEES). This is used to group departments together for reporting.
Parent Dept:	Help 4 characters Enter a valid <u>FAMIS department</u> . This allows FAMIS to identify the departmental hierarchy along with the current standard hierarchy levels (executive, department, division, college, etc.) By default the department is the <u>parent department</u> for a department with a subdepartment and is not modifiable.
Center/Institute:	Help2 charactersUsed to determine if a department is a Center or Institute and to group departments together for reporting. Valid values are:Blank=Regular departmentCA=Center - Board ApprovedCG=Center - GrandfatheredCN=Center - Not Board ApprovedIA=Institute - Board ApprovedIG=Institute - GrandfatheredIN=Institute - Not Board Approved
Mail to Dept Head:	1 character Type 'Y' if the <u>department head or director wants to receive a statement</u> .
Other Part Nbr:	2 digits Include <u>another campus code that owns part of the department inventory</u> .
Other Part Dept:	5 characters Enter the <u>department on another campus code</u> that <u>owns part of</u> the department <u>inventory</u> .
Other Part Sub Dept:	5 characters Enter the <u>other FAMIS member's sub-department</u> , if needed.
Dept Expiration Date:	8 characters Provide the <u>date the department expires</u> .
Dept Office:	10 characters Shows the <u>office for Routing & Approvals</u> that governs this department.

Screen 860 – Department Table Maintenance (cont'd)

Dept View:	10 characters Indicates the <u>electronic view</u> within the electronic office for Routing & Approvals <u>that governs this department</u> .	
Exec Office:	10 characters Shows the <u>executive office</u> for Routing & Approvals <u>that governs this</u> <u>department</u> .	
Exec View:	10 characters Shows the <u>electronic view within the executive office for</u> Routing & Approvals that governs this <u>department</u> .	
General Comments:	1 character 'Y' indicates <u>general comments</u> have been entered.	
FFX Comments:	1 character Displays 'Y' if comments have been entered for <u>Fixed Assets</u> .	
Additional Eurotions		
PF KEYS	See the Appendix for explanations of the standard PF Keys.	
PF7	Audit Information	
Audit	Displays the departmental table audit information.	
PF9	Download	
Dload	<u>Download</u> information from this screen <u>using Entire Connection</u> .	
PF10	General Comments	
GenCm	View any general comments.	
PF11	Fixed Assets Comments	
FFXCm	View any <u>fixed assets comments</u> .	

Section VI Electronic Office Quick Reference for Set Up

Quick Reference Office Setup

Office Level

Create Office Screen 940	Type in:	Name for the Office Description, Manager UIN, Delegates UIN, Default Signer UIN
Add Units Screen 941	Type in:	Dept and SubDept Office Name Executive Office Name (if required)

Create View Add Units Screen 920	Type in:	Office Name & Name for the View Function – Add (A), Update (U), Delete (D) Description, Dept & SubDept
Creator Desk Add People Screen 924	Type in:	Office Name & View Name & Form Description Function – Add (A), Update (U), Delete (D) UIN
Approver Desks Add People Screen 922 (opt)	Type in:	Office Name & View Name & Desk Description Function – Add (A), Update (U), Delete (D) Type – blank or Substitute (S) UIN
Signer Desk Add People Screen 923	Type in:	Office Name & View Name & Form Description Function – Add (A), Update (U), Delete (D) Type – blank or Substitute (S) UIN
Update Path Create New Paths Screen 921	Type in:	Office Name Description Function – Add (A), Update (U), Delete (D) Form, Dept/SubDept Category, Desk(s)

Exe	cutive	Level
LAC	CALINC	

Create View Add Units Screen 940	Type in:	Office Name "Y" next to Executive View "EXEC" under View Name
Add View to Units Screen 941	Type in:	Dept and SubDept Office Name Executive Office Name
Executive Desks Add People Screen 922	Type in:	Office Name & View Name & Desk Description Function – Add (A), Update (U), Delete (D) Type – blank or Substitute (S) UIN
Executive Paths Add Desks Screen 925	Type in:	Office Name Description Function – Add (A), Update (U), Delete (D) Form, Dept/SubDept Category, Desk(s)

Create View Screen 940	Type in:	Office Name "Y" next to Processing View Dept code under View Name
Processing Desks Add People Screen 922	Type in:	Office Name & View Name & Desk Description Function – Add (A), Update (U), Delete (D) Type – blank of Substitute (S) UIN
Create New Paths Screen 926	Type in:	Office Name Description Function – Add (A), Update (U), Delete (D) Form, Path Category, Desk(s)

Processing Level

Section VII Electronic Office Detail

Electronic Office Detail

An electronic office is a collection of units (departments and sub-departments) organized to facilitate document routing and approval. This electronic office is the highest order in the routing and approval structure. Within the structure can be many different views, units and desks.

The screens for the Administrative Functions are found on Menu M91.



Menu M91 – Electronic Office Management Menu

Creating Electronic Offices

Fiscal offices generally are responsible for creating the electronic offices and assigning units to these offices. Office names must be unique within a campus code. A default desk (with the same name as the office) is **automatically created** for each office with the office manager and delegates as the assignees. Most often the assignees need to be changed to reflect the appropriate persons. This desk can be used in routing paths as desired.

The Administrative Functions include establishing the office and adding units (depts/subdepts) to it.

TECH NOTE:
How to change Processing Office (bottom section of screen)
Run XXUPDOFF in FAMISU.
Program prompts for PARMS (Parameters)
Updates Screen 940 including Processing Office.
Unprotects and clears Screen 950.
•

Create/Modify Electronic Offices

Routing & Approvals revolves around the electronic office and its structure. The process of creating the electronic office involves giving it a title and description, identifying the Electronic Office Manager, Delegates, Default Signer and attaching units (combinations of departments / subdepartments) to the office.

Screen 940 - Office Create/Modify	
940 Office Create/Modify 06/06/07 17:33	
Screen: Office: PURCHASING	
Description: PURCHASING SERVICES	
Manager (UIN) : 5uuuuuuul YALE, YOLANDA Y	
Delegates (UIN) : 7uuuuuuu4 LANE, LINDA L	
Default Signer(UIN): 5uuuuuuu8 LEHR, LEONA L	
Comments:	
Y/N View Name	
Executive View:	
Processing View: Y PURS (Must be unique with the Campus code)	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12	
Hmenu Help EHelp AUDIT	

Basic Steps

Create a New Office

- Advance to Screen 940.
- Type your new office name on the Action Line and press <ENTER>.
- Key in the description, manager UIN, delegate UIN, and default signer UIN.
- Type additional information in the available fields, as desired.
- Press <ENTER> to record the information.

Modify an Existing Office

- Advance to Screen 940.
- Type a valid office name on the Action Line.
- Press <ENTER> to display existing office information.
- Add or modify information in the available fields, as desired.
- Press <ENTER> to record the information.

Electronic Office Process

To create a new electronic office, you give it a name and description followed by the UIN of the office manager, delegates, and the default signer.

- <u>Office Manager</u> the person who can update the Signer Desk (Screen 923) thereby having control over the signature authority. The Delegates do not have this ability. Backup to the Office Manager are the Security Officers who can update the Signer Desk using a special screen, Security Signer Desk Screen 943.
- **Delegates** handle all the other tasks of creating and maintaining the electronic office. There are two delegate positions available for each office.
- <u>Default Signer</u> the one who has the signature authority for the accounts that are in the departments that are assigned to the office. A default signer desk is automatically created and put on the department path when Screen 940 is complete.

Security needs to be tightly controlled for Screens 940, 943 and 923 because they control the electronic signature authority for the document being approved.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

Action Line

•	Office:	10 characters Identify the <u>office which will control routing and approving of documents</u> for units assigned to it.
Sci	een Information	
•	Description:	43 characters Enter a <u>description of the electronic office</u> .
•	Manager (UIN):	Help 9 digits Identify the <u>office manager</u> . This person is responsible for creating/ maintaining all desks, views and paths for the office.
•	Delegates (UIN):	Help 9 digits each Indicate the personal identification number and <u>name of the delegates</u> for the office.
•	Default Signer (UIN):	Help 9 digits Identify the personal identification number and name of the <u>person</u> who is to be <u>assigned to all signer desks</u> in the office.
	Comments:	3 lines (43 characters each) Available for free form entry of <u>comments</u> regarding the office.

Screen 940 – Office Create/Modify (cont'd)

Executive View Y/N:	See Executive Routing 1 character Indicate whether or not ('Y' or 'N') this <u>office has higher level responsibilit</u> and approve documents at this higher level.				
View Name:	Help 10 characters Identify the <u>department</u> having executive responsibilities.				
Processing View Y/N:	See Processing Routing 1 character Indicate whether or not ('Y' or 'N') this office has <u>responsibilities to "process"</u> <u>documents</u> . These may be departments like Purchasing Services/Fiscal Office.				
View Name:	Help10 characters Identify the <u>department</u> having executive responsibilities.				
<u>Additional Functions</u> PF KEYS	See the Appendix for explanations of the standard PF Keys.				
PF7 Audit	Audit Displays the <u>audit trail</u> information of who created and modified the selected document.				
	**** Audit Information **** Office: PURCHASING Date Created: 09/26/1994 Added By: KxxxxL LINDSEY, LAUREN Last Modify Date: 11/14/2001 Last Modify By: KxxxxW WALLER, WANDA W PF4=Exit				

Add Units to Electronic Offices

The second step in establishing an Electronic Office is to **assign units**. Units consist of department and subdepartments combinations. This allows the units to participate in the paths that are defined for that electronic office.

When departments and subdepartments are assigned to offices, on Screen 941, the link for delegation of electronic signature authority is complete. Fiscal accounts "belong to" or are assigned to a department; the department is then assigned to an electronic office. Within the office, documents will be routed to desks for approval. The persons assigned to Signer Desks are those people who have signature authority for the fiscal accounts.

Units (depts. / subdepts) can also be assigned to an Executive Office which means their documents will follow the executive path.

Screen	941 -	Units	to (Office	Assignment
--------	-------	-------	------	--------	------------

941 Unit to Office Assignment	06/06/07 17:32
Screen: Dept: BIOL SubDept:	CC 02
Dept Name: BIOLOGY Dept head: PARKER, PAULETTE P	
Office: BIOL Manager: CARLSON, COLLEEN C View: BIOLVIEW	
Exec View: VPSCI	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF3	10PF11PF12
Hmenu Help EHelp	

Basic Steps

- Advance to Screen 941.
- On the Action Line, type the names of the department and the subdepartment.
- To view a list of departments, type '*' in the Dept: field and press <ENTER>.
- Press <ENTER> to display the name of the department and its department head.
- Type the title of the office to attach the unit (department/subdepartment).
- Press <ENTER> to display the name of the office manager.
- Add or modify office assignment information in the available fields as necessary.
- Press <ENTER> to record the information.

Unit Assignment Process

Signature Authority

Signature authority for fiscal accounts is delegated via the assignment of the unit (department/subdepartment) to an office and within that office to a routing view.

Fiscal offices carry the responsibility for control of signature authority on university or agency accounts. They will identify the units, establish the routing and approval offices, and delegate authority to the offices.

Changing a Unit to Another Office

If a unit is already attached to a view within another office, the office field on Screen 941 is protected. To change the office, all routing paths which pertain specifically to that unit must be removed from the view using Screen 921. Then, the unit must be removed from the view using Screen 921. Then, the unit must be removed from the view using Screen 920. Update will subsequently be allowed on Screen 941.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Ac	<u>tion Line</u>	
•	Dept:	5 characters Indicate the <u>department</u> to link to a particular office. This is the primary department for each fiscal account.
•	SubDept:	5 characters Identify the <u>subdepartment</u> to link to a particular office.
Sci	reen Information	
	Dept Name:	10 characters Displays the <u>department name</u> matching the code entered on the Action Line.
	Dept head:	20 characters Shows the name of the <u>department head</u> for the department.
•	Office:	10 characters Identify the <u>office</u> to which the department is <u>linked</u> .
	Manager:	20 characters Displays the <u>name of the office manager</u> for the office to which the department is linked.
	View:	10 characters Displays the <u>view within the departmental office</u> this unit belongs to.
	Exec Office:	10 characters Shows the <u>executive office</u> name to which the department reports if it has been linked to an executive office.

Exec View: 4 characters Shows the word "EXEC" if the department/subdepartment is assigned to an <u>executive office</u>.

Additional Functions PF KEYS

See the Appendix for explanations of the standard PF Keys.
Section VIII Department Level Detail







Department View

A Department view consists of a set of units whose documents route to the same Signer Desk. Documents within a view may pass through a variety of different paths and different approver desks, but always complete Department Level routing at the same Signer Desk with the same set of persons as 'signers'.

Within an office, multiple Department views can be created, allowing for many different combinations of departments and subdepartments. A view represents a grouping of these units that share common signers, but may have different approvers. The Department view is created or modified using Screen 920.

For example, Organic Chemistry documents could have Dr. Blue and Dr. Red as signers (i.e. on the Signer Desk) while the units attached to Chemistry have a Signer Desk with Dr. House and Dr. Hall. When, within a single electronic office, different people are needed on a signer's desk, a new view may be created.

At least one Department view is required for all electronic offices.

920 Dept View Create/Modify	06/06/07 17:26			
Screen: Office: PURCHASING View: PURCHASING				
Description: PURCHASING SERVICES Manager : YALE, YOLANDA Y				
Func Dept Sub-Dept				
PURS PURCHASING SERVICES (STRATEGIC, SOURC	ING)			
_ PURS_ STRS_ PURCHASING- STORES				
*** End of list ***				
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12				
Hmenu Help EHelp				
ment help hittp				

Screen 920 - Department View Create/Modify

Basic Steps

- Advance to Screen 920.
- Type the name of an electronic office and the name you wish to give a view on the Action Line and press <ENTER>. The name of the office manager will display. If the view already exists, the description and units will display.
- Add or modify data in the appropriate fields as desired.
- Press <ENTER> to record the information.

Department View Process

Create Department Views

A unit can belong to only one Department routing view. Each name for a view must be unique within an office. When you create a view, a default path - seen on Screen 921 with the wildcard symbol (*) in both the form and unit fields - is automatically created and is displayed with key fields in a protected status. The '*' as a wildcard means 'all' as in documents of all forms and from all units. This default path, which cannot be deleted, ensures that all documents find a path and are routed.

Add Department Units

If you want to change a department from one view to a new view, a pop-up window appears for confirmation of the change. If the user replies 'Y' (yes), the unit is dropped from the original view and added to the current view. You need to go to Screen 921 for the original view and delete all paths set up specifically for the unit.



Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

Ac	<u>tion Line</u>	
•	Office:	10 characters Identify the <u>title of the electronic office</u> for which you wish to create a view.
•	View:	10 characters Indicate the <u>name of the view</u> you wish to create or modify (Minimum of 6 characters required).
<u>Scr</u>	<u>een Information</u>	
	Description:	43 characters Describes the <u>view within the office</u> .
	Manager:	30 characters Displays the <u>name of the office manager</u> .
•	Func:	1 character Indicate the desired <u>function</u> : <u>A</u> dd or <u>D</u> elete a department/subdepartment, or <u>P</u> osition a department/subdepartment at the top of the list.

Screen 920 – Department View Create/Modify (cont'd)

•	Dept:	Help 5 characters
		Enter the <u>code for the department</u> . <i>Note</i> : The department must exist on FAMIS department table (Screen 860).
	Sub-Dept:	Help 5 characters Include the <u>code for the subdepartment</u> . <i>Note</i> : The subdepartment must exist on FAMIS department table (Screen 860).
_		

Additional Functions

PF KEYS

See the Appendix for explanations of the standard PF Keys.

Creator Desks

Technically, the document "creator" (for purposes of the Routing & Approval System) is the person who initiates or submits the document to R&A -- either as part of the document close process or by pressing the "Route" PF Key on the close screens. In the routing history, the document will show as "submitted by".

But you do not have to be on the Creator Desk to create and submit documents to Routing and Approvals. The creator desk has a very specialized function. A minimum of two people must be assigned to a Creator Desk. These assignees access documents that are rejected or recalled to another creator's Inbox using Screen 911.

For example, an assignee to the Creator Desk checks another creator's Inbox in their absence and finds a rejected document. The assignee takes appropriate action on the document.

Creator Desks are unique within the office and view. The name for these desks is "CREATE" plus the form. The "blank" form is the default and is used for all forms unless a specific form is created, for example, "CREATE PRQ" for requisitions. There can be a different set of creators for each form type.

	924 Creato	or Desk Modify	06/06/07 17:20
	Screen:	Office: PURCHASING View: PURCHASING	CC 02
	Descriptio	on:	_
	Office Mgr	: YALE, YOLANDA Y	
	Desk	: CREATE DSK (Default)	"Blank" is the
	Func Type	UIN Name	default "form" for
	_	5uuuuuu8 LOMAS, LEONA L	this field.
	_	7uuuuuuu4 LANE, LINDA L	
	_		
	-		
	_		
	-		
	-		
	-		
	-		
	-		
	ton DE1		
EI	Hmenu	Help EHelp	rr9rr10rr11Pf12

Screen 924 - Creator Desk Modify

Basic Steps

- Advance to Screen 924.
- Type the electronic office name and view in the Action Line. You may type an asterisk (*) in the View: field or Form: field to make your selection from a pop-up window.
- Press <ENTER> to view the Creator Desk information.
- If this is your first time to access the Creator Desk, you may change the default UINs to other creators.
- Add or modify data in the available fields as desired and press <ENTER> to record the information.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Ac	<u>tion Line</u>	
•	Office:	Help 10 characters Indicate the <u>title of the office which governs the creator desk</u> .
•	View:	Help 10 characters Identify the <u>view which governs the creator desk</u> .
	Form:	Help 3 characters Identify the <u>type of documents</u> that will be <u>routed</u> through a particular path. For example, requisitions will only route through the path with the form=PRQ.
	Delete Desk:	1 character Type 'Y' to <u>delete the desk</u> .
<u>Scı</u> ♦	r <u>een Information</u> Func:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd or <u>D</u> elete an assignee, <u>P</u> osition a particular person at the top of the list, or <u>U</u> pdate an assignee.
•	Туре:	Help 1 character Indicate if the person is a <u>primary approver (blank) or substitute approver</u> ('S') on the desk.
•	UIN:	Help 9 digits Identify the <u>personal Universal Identification Numbers (UIN)</u> for the people assigned to the desk.
	Name:	32 characters Shows the <u>name associated with the UIN</u> .
Ad	ditional Functions	

See the Appendix for explanations of the standard PF Keys.

PF KEYS

Approver Desks

An approver desk is like an approval station. Each person assigned to the desk has the ability to access the document and take necessary routing action on it. This may be an 'approver', a substitute approver or a person who is charged with reviewing the work of the creator for all documents routed to that desk. There may be multiple primary approvers – likewise, there can be many substitute approvers. Up to 40 people may be assigned to a single desk.

To create a new desk it must have at least <u>one</u> assignee.

922 Approver Desk Create/Modify 06/06/07 17:18			
CC 02			
Screen: Office: PURCHASING Desk: PURCHASING Delete Desk: N			
Description: DEFAULT DESK OF OFFICE MANAGER			
Number of Assignees: 2			
Func Type UIN Name			
5uuuuuul YALE, YOLANDA Y			
7uuuuuu4 LANE, LINDA L			
Entroy DE1 DE2 DE4 DEE DE4 DE7 DE9 DE9 DE10 DE11 DE12			
Hmenu Helb FHelb			

Screen 922 - Approver Desk Create/Modify

Basic Steps

- Advance to Screen 922.
- Type the name of the office and desk on the Action Line and press <ENTER> to display current desk information.
- Add or modify desk assignees as desired.
- If the UIN number is not known, press PF2 from the UIN: field and search for the person's name, select it and press <ENTER> to have FAMIS enter the UIN number in this field.
- Press <ENTER> to record the information.

Approver Desk Process

Creating Routing and Approval Desks

Documents can be routed to approval desks which sit on routing paths. Routing paths determine which series of desks a document will pass through. Office managers and delegates use Screen 922 to create (or modify) the approval desks and assign people to these desks. Each desk name must be unique within an office.

Approvers are entered by their UIN and are designated as either a primary or a substitute approver. Primary approvers receive all documents in their Inboxes. As a substitute, you go to Screen 911, key in the name of one of the primary approvers in order to see all the documents awaiting approval.

Concept of a Substitute on a Desk

Substitutes are persons recognized to act in place of primary approvers or signers. When acting as a substitute, you do not receive those documents in your personal Inbox (Screen 910), but access documents in your role as substitute on Screen 911.

As the document proceeds through the routing path, it skips a desk that has a primary who has already approved the document. However, documents will not skip over a substitute on a desk. So if you are a primary person on a desk and a substitute on the following desk in the path, the document will not skip the second desk, but will stop at the Inbox of the primary person(s) for approval.

Within a level, an individual typically only has to touch a document once - as a creator, approver or signer. (This is also true across the Department and Executive levels – routing will remember the person and not require them to sign again.)

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Ac</u>	<u>tion Line</u>	
•	Office:	10 characters Indicate the <u>title of the office</u> to which the desk will belong.
٠	Desk:	Help 10 characters Identify the <u>approval desk</u> that is to be created/modified.
	Delete Desk:	1 character Type 'Y' to <u>delete a desk</u> .
<u>Scı</u> ♦	r <u>een Information</u> Description:	43 characters Enter a <u>description of the desk</u> that is being created/modified.
	Number of Assignees:	3 digits Indicate the <u>number of people</u> that are <u>attached to the desk</u> . <i>The desk must</i> <i>have at least one assignee.</i>
•	Func:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd, <u>D</u> elete, <u>U</u> pdate an assignee, or <u>P</u> osition a particular person at the top of the list.

Screen 922 – Approver Desk Create/Modify (cont'd)

•	Туре:	Help 1 character Indicate if the person is a <u>primary approver (blank) or substitute approver</u> ('S') on the desk.
•	UIN:	Help 9 digits Identify the <u>Universal Identification Numbers (UIN)</u> for the people assigned to the desk.
	Name:	32 characters Displays the <u>name associated with the UIN</u> .

Additional Functions

PF KEYS

See the Appendix for explanations of the standard PF Keys.

Signer Desks

Exercising electronic signature authority is just like signing paper documents. You must be authorized to sign. With electronic documents, the computer audits who can sign and who does sign the documents.

The people on the Signer Desk have signature authority on the accounts for the units assigned to the office and view. Signer Desks are only at the Department Level.

```
You can delete a specific "form" desk using Screen 923, but not the default Signer Desk (which has a blank "form").
```

Screen 923 - Signer Desk Modify

```
923 Signer Desk Modify
                                                                06/06/07 17:16
                                                                         CC 02
 Screen: ____ Office: PURCHASING View: PURCHASING Form:
                                                      Delete Desk: N
 Description:
 Office Mgr : YALE, YOLANDA Y
           : SIGNER DSK (Default)
 Desk
 Func Type UIN
                        Name
  _____
       S 5uuuuuuu8 LANE, LORENA L
_ 8uuuuuuu0 JOEL, JENNIFER J
S 8uuuuuuu7 STILES, SARAH S
        _ __
                 ******* End of list ******
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help EHelp
```

Basic Steps

- Advance to Screen 923.
- Type a valid office and view name on the Action Line and press <ENTER>.
- If this is your first time to access the Signer Desk, add the names of all of the signers to the desk. Add or modify information in the available fields as necessary, and press <ENTER> to record the information.

Modify Electronic Signatures Process

Modifying the authorized electronic signatures on a document is controlled at the Signer Desk. The default signer is assigned when the office is created on Screen 940. The name for these desks is "SIGNER" plus the form. The form may be blank (default) or it can be a specific form: for example, SIGNER PRQ for requisitions or SIGNER PLP for limited purchases. There can be a different set of signers for each form type.

Only the office manager can update on this screen. In the absence of the office manager, the security officers at the each agency can update the Signer Desk.

The default signer may only be removed from the Signer Desk if there is another assignee and the office manager cannot add himself/herself to a Signer Desk.

When the default signer is changed for an office, the new "default" signer is put on the "SIGNER" desk for the blank (default) form <u>and</u> on EACH additional form that exists for the office. If the default signer is not on the form, it is added. If the default signer is already on the form, the signer will be changed to match the new default signer.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

Act	tion Line		
•	Office:	10 characters Indicate the <u>title of the office</u> to be displayed.	
٠	View:	Help 10 characters Identifies the <u>name of the view</u> to be displayed.	
	Form:	Help 3 characters Identify the <u>type of documents</u> that will be routed through a particular path. For example, requisitions will only route through the path with the form=PRQ.	
	Delete Desk:	1 character Type 'Y' to <u>delete the desk</u> . You can only delete a specific form.	
Scr	een Information		
	Description:	43 characters Enter a <u>description of the office/view</u> combination.	
	Office Mgr:	30 characters Displays the <u>name of the office manager</u> for the office/view.	
	Desk:	10 characters Identifies all of the defined <u>signer desks</u> for that view.	
•	Func:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd, <u>D</u> elete, <u>U</u> pdate an assignee, or <u>P</u> osition a particular person at the top of the list.	
•	Туре:	Help 1 character Indicate if the <u>person is a primary approver (blank) or substitute approver</u> ('S') on the desk.	
•	UIN:	Help 9 digits Identify the <u>Universal Identification Numbers (UIN)</u> for the people assigned to the desk.	

Screen 923 – Signer Desk Modify (cont'd)

Name:32 charactersDisplays the name associated with the UIN.

Additional Functions

PF KEYS See the Appendix for explanations of the standard PF Keys.

A routing path is a sequential list of desks which specifies the order and destination for routing documents. Generally, different paths may be created for each:

- Form (PLP)
- Department/Subdepartment combination
- Whole Dollar amount category (under \$1,000)

A default path, with an '*' in both the form and unit fields, is automatically created and will be displayed with key fields in a protected status. The '*' acts as a wildcard and means 'all'. This default path, which cannot be deleted, ensures that all documents will match a path and be routed.

E** and P** have been included as valid route forms.

921 Dept Paths Create/Modify	06/06/07 17:12
Screen: Office: PURCHASING View	v: PURCHASING
· · · · · <u>—</u> · · · · · · · · · · · ·	
Description: PURCHASING SERVICES	
Office Mgr : YALE, YOLANDA Y	
F Form Dept/Sub Category	
N Sta	atus and Desks
<mark>* *</mark>	
	SIGNER DSK
_ EBR PURS	
_ APPROVE	SIGNER DSK
_ EWR PURS	diamen nav
	SIGNER DSK
	ATOWNS STR
_ APPROVE	SIGNER PEP
_ PEP PURS STRS	
	SIGNER PEP
France DE1 DE2 DE2 DE4 DE5 DE6	105 *** DE7 DE9 DE9 DE10 DE11 DE13
LILLEL -FFIFF2FF3FF4FF5FF6	Namog
ншени нетр внегр	Names

Screen 921 - Department Paths Create/Modify

Create/Modify Department Routing Paths

- Advance to Screen 921.
- Type a valid office and view on the Action Line and press <ENTER> to display existing path information.
- Add or modify data in the available fields as necessary.
- Place cursor on line area under Desks or on "Signer DSK/Signer PLP" and press PF7 to view names on the "Signer Dsk" or "Signer PLP".
- Press <ENTER> to record the information.

Routing Path Process

There can be up to four desks in each of the routing paths plus the Signer Desk, which is always the last desk. The people assigned to the Signer Desk are those with signature authority for the Department accounts.

When a document has accounts from different departments, it will route for Department approval based on the first department specified on the original document, then for Department approval based on the second department and so on until the Department approvals are complete.

If any of the departments is attached to an executive view, the document then goes through the appropriate executive paths.

When a document requires different routing based on a dollar amount, a path will be defined with an entry in the category field. A document that is over the dollar amount listed in the category field will follow that path for approval. For example, if 1000 is entered in the category field on the routing path, the path is valid for documents whose total is equal to or greater than \$1000.

The category field is not available for entry in a path that contains an '*' anywhere (i.e. P** is not permitted) in the Form: field.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Ac</u>	<u>tion Line</u>	
•	Office:	10 characters Indicate the <u>title of the office</u> which governs the routing.
٠	View:	10 characters Identify the <u>view governing the routing paths</u> .
<u>Sci</u> Pat	r <u>een Information</u> Th Information	
•	Description:	43 characters Describe the <u>view to create or modify</u> .
	Office Mgr:	30 characters Displays the <u>name of the office manager</u> .
•	FN:	Help 1 character Indicate the desired <u>function</u> : A dd, <u>U</u> pdate, or Delete a path, or <u>P</u> osition a particular path at the top of the list.
•	Form:	Help 3 characters Identify the <u>type of documents</u> that will be routed through a particular path. For example, requisitions will only route through the path with the form=PRQ

•	Dept/Sub:	 10 characters Indicate the <u>department/subdepartment</u> combination from which documents will be routed for a particular path. Help 10 characters/digits Accepts dollar amount criteria defining <u>which documents should route through a particular path</u>. For approval of documents equal to or greater than a particular dollar amount, a separate path can be created. 		
	Category:			
	Status and Desks:	Help1 characterIndicatehow the document should go to the desk and to what desk.Blank=ApprovalI=InformationN=Notification		acter <u>v the document should go to the desk and to what desk</u> . Approval Information Notification

Additional Functions

PF KEYS

PF7	Names of desk assignees
Names	Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor
	is on a desk name.

See the Appendix for explanations of the standard PF Keys.

+				-+
 DESK: SI	GNER DSK			
UIN	STATUS	NAME		ļ
5uuuuu 8uuuuu 8uuuuu	1008 S 1000 1007 S	LANE, LORENA L JOEL, JENNIFER J STILES, SARAH S		
 *** EN 	D OF LIST -	3 WORKERS FOUND	PF4 to Quit	

Section IX Executive Level Detail

Executive Level Detail

Executive routing paths are used to add another level of approvals. When a document finishes department level routing, it can pass through an executive path for approval. Use of executive level routing is optional. For example, all the documents for the VPFIN Office will automatically route through an executive path, say to the VPFIN EXEC.

Before executive paths can be created, an office must be defined as having executive responsibilities (Screen 940). **The view name is always 'EXEC'.**

The name of the Executive Level does not have to be the name of an existing office and does not have to be defined on Screen 860.

Create Executive View

940 Office Create/Modify	06/06/07 16:57
Screen: Office: VPFIN	
Description: EXECUTIVE OFFICE FOR VPFINANCE	
Manager (UIN) : 5uuuuuuul WELSH, WESLEY W	
Delegates (UIN) : 4uuuuuuu8 RICHEY, RHONDA R 4uuuuuuu7 SCOTT, SUE S	
Default Signer(UIN): 5uuuuuuul WELSH, WESLEY W	
Comments:	The View Name
Y/N View Name	is always 'EXEC'
Executive View: Y EXEC_	
Processing View: (Must be uni	que with the Campus code)
Enter-PF1PF2PF3PF4PF5PF6PF7PF8	-PF9PF10PF11PF12
Hmenu Help EHelp AUDIT	

Screen 940 – Office Create/Modify (with 'Y' in Executive View)

Add Executive Level to Units

Screen 941 – Unit to Office Assignment

941 Unit to Office Assignment	06/06/07 17:00
	CC AA
Screen: Dept: VPBAS SubDept:	
Dept Name: VICE PRS FOR BUS ADMIN - STUD SERVICES Dept head:	
Office: VPFINANCE_ Manager: WELSH, WESLEY W View: VPFINANCE1	
Exec Office: VPFIN	
Exec View: EXEC	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF1(Hmenu Help EHelp)PF11PF12

This is done for each of the dept / subdept combinations that participate with this executive level office.

The Department Table (Screen 860) displays the Executive View indicating that documents from the department will pass through Executive paths.

860 Department Table Maintenance	06/06/07 17:01
Screen: Department: VPBAS Sub Dept:	CC AA
Dept Name: VICE PRS FOR BUS ADMIN - STUD SERVICES	
Head/Director Phone: Alt APO Phone:	
Mail Code: Building Number:	
Exec Level: SS Building Campus:	
Division: EM Room:	
School/College: Group Cd:	
Off Campus Flag: N Other Loc:	
Budget Sort Dept Nbr: Approx. Inv. Count:	
FRS Allow Flag: Y DBR Allow: _ FFX Allow Flag: Y	
Purch Trn Flag: _ EPA Allow: _ FFX Cert. Month:	
Other Part Nbr: Mail to Dept Head: _	
Other Part Dept: Dept Office: VPFINANCE Ge	neral Comments: N
Other Part Sub Dept: Dept View: VPFINANCE1	Hit <pf10></pf10>
Exec Office: VPFIN	FFX Comments: N
Dept Expiration Date: Exec View: EXEC	Hit <pf11></pf11>
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF	10PF11PF12
Hmenu Help EHelp Audit Dload Ge	nCm FFXCm

Create Approver Desks for Executive Level

Screen 922 – Approver Desk Create/Modify

922	2 A	Approv	ver Desk Cre	ate/Modify			06	5/06/07	17:03
Scr	ee	en:	Office:	VPFIN	Desk:	EXEC-DSK1_	Delete Desk	: N	CC AA
Des Num	scr abe	riptio er of	on: EXECUTIN Assignees:	ZE DSK 1 FOR 2	VP FINAN	ICE			
Fur	nc	Туре	UIN	Name					
-	_	_	8uuuuuuu2	SHORE, SHAW	NA S				
_	_	S	6uuuuuu1	KRAMER, KOR	EY K				
-	-	_							
-	-	—							
-	-	-							
-	-	_							
-	-	-	****	End of list	*****				
Enter	:-P	F1	-PF2PF3	-PF4PF5	-PF6F	PF7PF8E	PF9PF10F	F11P	F12
	H	Imenu	Help EHelp	b					

You need to create as many desks as you want to put in the Executive paths.

Create Executive Paths and Add Desks

This example shows how you can create different Executive paths based on the document type.

925 Executive Paths Create/Modify 04/16/08 12:0 CC 5 Screen: Office: ARTSCEXEC_ View: EXEC Description: Executive view	Scr	een S	925 - Execi	utive Paths	Create/Mo	dify		
CC 5 Screen: Office: ARTSCEXEC_ View: EXEC Description: Executive view Office Mgr : WALKER, WALT W F Form Dept/Sub Category N Status and Desks	92	25 Exe	cutive Paths	Create/Modif	y		04/16/08	12:00
Screen: Office: ARTSCEXEC_ View: EXEC Description: Executive view								CC 58
Description: Executive view	So	creen:	Offic	e: ARTSCEXEC	_ View: EXEC			
F Form Dept/Sub Category N Status and Desks - - EBR * ARTSCDEAN_ PROVOST	De Of	escrip Efice 1	tion: Execut Mgr : WALKER	ive view , WALT W				
N Status and Desks _ EBR * _ EGR * _ ARTSCDEAN_ PROVOST _ ARTSCDEAN_ GRAD-DEAN_ PROVOST _	F	Form	Dept/Sub	Category				
_ EBR * ARTSCDEAN_ PROVOST _ EGR * ARTSCDEAN_ GRAD-DEAN_ PROVOST _ ARTSCDEAN_ GRAD-DEAN_ PROVOST _ ARTSCDEAN_ GRAD-DEAN_ PROVOST 	N				Status and	Desks		
_ ARTSCDEAN_ PROVOST	-	FBD	*					
_ EGR * ARTSCDEAN_ GRAD-DEAN_ PROVOST		EDR		ARTSCDEAN	PROVOST			
ARTSCDEAN GRAD-DEAN PROVOST	_	EGR	*					
				_ ARTSCDEAN_	GRAD-DEAN_	_ PROVOST_		
	-							
	_							
	_							
*** End of list *** Enter-PF1PF2PF4PF5PF7PF8PF9PF10PF11PF12	Ente	er-PF1	*** End	of list ***				712
Hmenu Help EHelp Names		Hme	nu Help EHe	1p 115	Names			

Basic Steps

- Advance to Screen 925.
- Type an office name on the Action Line and press <ENTER> to display existing path information.
- Indicate whether you wish to add, update, or delete path information.
- Add or modify screen information, as desired, and press <ENTER> to record the information.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

Enter a description of the executive view.

Action Line

Office:	10 characters
	Enter the <u>title of the office</u> governing the routing.
• View:	10 characters
	Identify the view governing the routing paths.
Screen Information	<u>1</u>
Path Information	
Description:	40 characters

Executive Level Detail (cont'd)

Office Mgr:	20 characters Displays the <u>name of the office manager</u> .
◆ FN:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd, <u>U</u> pdate, or <u>D</u> elete a path, or <u>P</u> osition a path at the top of the screen.
• Form:	Help 3 characters Indicate the <u>type of documents</u> that will be routed through the path. An asterisk (*) may be used as a wildcard.
Dept:	Help 5 characters Include the <u>department</u> from which documents will be <u>routed through</u> the path. An asterisk (*) may be used as a wildcard.
Category:	Help 10 digits For <u>approval of documents</u> above or equal to a particular dollar amount, a separate path can be created. If more than one path could apply to a given document it will follow the path that is the 'best fit' .
Status and Desks:	Help1 characterIndicate how the document should go to the desk and to what desk.Blank= ApprovalI= InformationN= Notification
<u>Additional Function</u> PF KEYS	<u>5</u> See the Appendix for explanations of the standard PF Keys.
PF7 Names	Names of Desk Assignees Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor is placed on a desk name.

Section X Processing Level Detail

Processing Level Detail

Screen 926 provides the ability to create and modify processing paths. Processing paths contain desks that do special processing for certain kinds of documents. For example, purchasing requisitions, when finished routing through all departments, route to the Purchasing Office. In this office workers on the various desks value-add to the document. In the case of requisitions, buyers transfer requisition documents into bid documents and ultimately into Purchase Orders. Documents advance to a processing path when all other routing and approval requirements have been satisfied.

Create Processing Level Office

940 Office Create/Modify	06/06/07 16:23
Screen: Office: PURCHASING	CC 02
Description: PURCHASING SERVICES	
Manager (UIN) : 5uuuuuuul YALE, YOLANDA Y	
Delegates (UIN) : 7uuuuuuu4 LOMAS, LINDA L	
Default Signer(UIN): 5uuuuuuu8 LANE, LEONA L	
Comments:	
Y/N View Name Executive View:	
Processing View: Y PURS (Must be unique with	n the Campus code)
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9F	PF10PF11PF12
Hmenu Help EHelp AUDIT	

Screen 940 – Office Create/Modify (with 'Y' in Processing View)

Create Approver Desks for Processing Paths

Screen 922 – Approver Desk Create/Modify

922	Appro	ver Desk Cre	ate/Modify		06/06/07	16:27
			-			00 02
Scre	en: _	Office:	PURCHASING Desk: CENT	RLDESK Delete De	esk: N	
Deee			DDOGRAATING DEAK			
Desc	ripti	on: CENTRAL	PROCESSING DESK			
Numb	er of	Assignees:	7			
Fund	Turne	IITN	Namo			
Func	Type	01N	Name			
_	_	7uuuuuuu8	ENGLISH, ELISA E			
_	S	9uuuuuuu8	KARL, KENDRA K			
_	S	3uuuuuuu4	CARVER, CHARLES C			
_	S	4uuuuuu3	POEHL, POLLY P			
	s	5uuuuuuu9	DREW, DONALD D			
_	-	E1	VALE VOLANDA V			
_	5	Suuuuuuu	IALE, IOLANDA I			
_	S	7uuuuuuu4	LOMAS, LINDA L			
-	_					
_	_					
		*****	End of list ******			
Enter-	PF1		-PF4PF5PF6PF7	-PF8PF9PF10)PF11PF	217
Lincer		Tralm Tralm	-	110 119 1110		
	нmenu	Herb EHelb	P			

Create Processing Paths and Add Desks

Use of "Path" is unique to this screen. In the Processing Office for Purchasing, all documents go to the CENTRLDESK. Then a person forwards the document using the action of "FYP" and entering the name of the path. Other types of Processing Offices (EPA and DBR) have different methods for documents to find the appropriate path within the Processing Office. <u>Refer to</u> **Essentials Section** for further details.

Screen 926 - Processing Paths Create/Modify

926 Processing Paths Create/Modify 06/06/07 16:38			
CC 02			
Screen: Office: PURCHASING View: PURS			
Description: PURCHASING/STORES PROCESSING PATHS			
Office Mgr : YOUNG, YVETTE Y			
F Form Path Category			
N Status and Desks			
_ * *			
_ CENTRLDESK			
_ * ADMIN			
_ ADMIN-CI ADMIN			
ADMIN-C2 ADMIN-B2			
* ADMIN-3			
ADMIN-C3ADMIN-B3			
*** Press <enter> to view more entries ***</enter>			
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12			
Hmenu Help EHelp Names			

Basic Steps

- Advance to Screen 926.
- Type an office name on the Action Line and press <ENTER> to display existing path information.
- Indicate whether you wish to add, update, or delete path information.
- Add or modify screen information as desired.
- Press <ENTER> to record the information.

The office must be designated as having processing responsibilities on Screen 940 before any data can be entered on this screen.

<u>Refer to **Essentials Section** for further details</u> on ways to route within the Processing Office based on the document Form or Type.

Routing Process

Generally, for purchasing documents, they go to a central desk. Then someone directs the document to a specific path by using the "FYP" action. The path entered is one of the paths that is on Screen 926.

+	+
Screen:	04/16/08 11:31
*** Dunghaging Degument Geven Sheet ***	
Purchasing Document Cover sheet	CC SA
Actions FVD the there are a the tracks	'n
ACTION: FIP *ROUTING NOTES EXIST.	ļ
	i i i i i i i i i i i i i i i i i i i
bec ib. reginzoooto beatas. rinar	
Requested Action: Approve	
Doc Summary +	+
	_
Attachments Enter 'PATH' to route thru: ADMIN	
	■ ¦ ¦
Requisition	
Contact Bor	i i
	I I
Dept N +	+
Doc Total 40,000,00 Untransferred Total	40.000.00
	10,000.00
PF4PF5PF6PF7PF8PF9PF	10PF11PF12
Exit NDog Cumm Pligt Audit Notog Ho	adr Itoma Track
EATL NDOC SUMM RAISE AUGIL NOLES AG	AUT ICEMS ITACK
+	+

In essence this document came to the 'Centrldesk' and is shown being sent to the Processing Path named 'ADMIN' as seen on Screen 926.

For Purchase Orders, users enter the name of the PATH on the document close screen.

226 Purchase Order Do	cument Close	06/06/07 16:40		
	FY 2007 CC 02			
Screen: Doc: P80	0025 Q11 LABS			
<< Dates >>				
Document: 06/05/2007	Cat: RO User Ref: 27030008031	St Req:		
Start : 10/01/2007	Contact Person: LINDA LORRAINE	Ph: 979-845-8888		
End : 09/30/2008	Buyer: BBB BARNES, BARRY B	Ph: 979-845-2000		
Required:	Research (Y/N): N Type Funds: L	Type Order: HIED		
Change :	No. Last Print Date:			
+	**			
	nter `PATH' to route thru:	<u> </u>		
Doc Summary:				
maked because				
Total Amount:				
+	Corresponds to pa	ath on Screen 926.		
	IN PIOCES			
	Close Document? Y			
Budget Balance Overr	ide: _ Session: 1586JC	Date: 06/06/07		
Enter-PF1PF2PF3-	PF4PF5PF6PF7PF8PF9	-PF10PF11PF12		
Hmenu Help EHel	p Next Item Route	Warns		

226 Purchase Order Document Close	06/06/07 16:40
Screen: Doc: P800025 Q11 LABS	FY 2007 CC 02
+	+ <mark>+</mark>
** Warning Errors *	*
F2215 Document has been routed to GAPUR PUR for approval	
F2514 Document contains unit (s) which require manual appr	roval
	l l
÷	<mark>+</mark>
Budget Balance Override: Session: 1586JC	Date: 06/06/07
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9P	F10PF11PF12
Hmenu Help EHelp Next Item Route	Warns

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Ac	tion Line	
Office:		10 characters Indicate the <u>title of the office</u> which governs the routing.
	View:	10 characters Displays the <u>view within the departmental office</u> this unit belongs to.
Sci	reen Information	
	Description:	40 characters Enter a <u>description of the executive view</u> .
	Office Mgr:	20 characters Displays the <u>name of the office manager</u> .
•	FN:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd a new path, <u>U</u> pdate an existing path, <u>D</u> elete an existing path, or <u>P</u> osition a path at the top of the screen.
•	Form:	Help 3 characters Enter the <u>type of documents</u> to be routed through the path. An '*' may be used as a wildcard.
	Path:	10 characters/digits Include which <u>path documents will be routed to</u> from a central desk via the 'FYP' action.
	Category:	Help 10 characters/digits For <u>approval of documents</u> above or equal to a specific dollar amount, a separate path can be created. If more than one path could apply to a document it will follow the path that is the 'best fit'.

Processing Level Detail (cont'd)

```
Help 1 character
```

Indicate how the document should go to the desk and to what desk.

Blank	=	Approval
-------	---	----------

I = Information

N = Notification

Additional Functions

PF Keys

See the Appendix for explanations of the standard PF Keys.

PF7

Names of Desk Assignees

Names

Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor is placed on a desk name.

+			+
DESK: ADMIN-	C1		
UIN	STATUS	NAME	
 7uuuuuuu4		JONES, JOHNNY J	
5uuuuuuu1	S	GARRETT, GEORGIA G	; İ
7uuuuuuu8	S	ENGLISH, ELISA E	
*** END OF	LIST - 3	WORKERS FOUND	
			PF4 to Quit
			I
+			+

Section XI Electronic Office Delete

Electronic Office Delete

Managing the Electronic Offices is important for efficiency and continued ease of use. Deleting an outdated or unused Electronic Office is a necessary, but tedious task. Essentially, all steps must be done in somewhat reverse order to the original setup, that is, all the supporting structure must be deleted first. The following page shows the steps in order that must be taken to delete an electronic office with Department Level structure.

Department Level

See the Chart on the next page for the Steps to deleting an Office and the Department Level.

Deleting desks is done on the same screen where the desks are created. Screen 924 for Creator Desks, Screen 923 for Signer Desks and Screen 922 for Approver Desks. There is a Delete Desk field that requires you to key a 'Y' to delete.

A Department View may be deleted only if there are no Signer Desks, no Creator Desks, no routing paths and no units belonging to the view (except the default Signer and Creator desks and the default path). The Units must be deleted from the View on Screen 920 and then the Department View itself is deleted using Screen 928 Department View Delete. So before trying to delete a view, you must use the appropriate screens to delete all of the attached entities.

When the view is deleted, the default Signer Desk, the default Creator Desk and the default routing path are automatically deleted.

Executive Level

The paths on Screen 925 Executive Paths can be deleted by keying a 'D' in the Function field. You use Screen 922 Approver Desks to delete the desks that are used in the Executive Level. There is a Delete Desk field that requires you to key a 'Y' to delete.

Contact FAMIS Services to assist in removing the 'Y' on Screen 940 for an Executive Office. A program, XXUPDOFF, must be run to make this change.

Processing Level

The paths on Screen 926 Processing Paths can be deleted by keying a 'D' in the Function field. You use Screen 922 Approver Desks to delete the desks that are used in the Processing Level. There is a Delete Desk field that requires you to key a 'Y' to delete.

Contact FAMIS Services to assist in removing the 'Y' on Screen 940 for an Executive Office. A program, XXUPDOFF, must be run to make this change.

Delete Desks Delete all desks on all paths except the default path by 'U' Screen 921 in Function and space out the desk name **Delete Paths** Delete all paths except the default path by 'D' in the Screen 921 Function Delete Creator Desk Delete all Creator Desks for all Forms except the default Form (blank) by 'Y' in Delete Desk Field Screen 924 **Delete Approver Desks** Delete all Approver Desks for that Office by 'Y' in Delete Screen 922 Desk Field. Delete Signer Desk Delete all signer Desks for all Forms except the default Screen 923 (blank) by 'Y' in Delete Desk Field Delete all Dept/SubDept from the View(s) by 'D' in the Delete Units in View(s) Screen 920 **Function field** Delete the View(s) Delete the View(s) by keying in the View name Screen 928 Delete Exec Level from Unit Delete the Exec Level from Unit(s) by spacing out the Exec Screen 941 Office name Delete Office from Unit Delete the Office from Unit(s) by spacing out the Office Screen 941 name Delete the Office Delete the Office by entering 'Y' to Delete Screen 944

Delete an Office with Dept Level
When a Department View has been created in error or is no longer necessary, Screen 928 is used to delete the view. Department Views are created and maintained on Screen 920, but must be deleted using Screen 928.

928 Dept View Delete		06/06/07 17:11
		CC 02
Screen: Office: PURCHASI	ING	
Delete Views:	Messages	

Basic Steps

- Advance to Screen 928.
- Type a valid office name on the Action Line and press <ENTER>.
- Type the view names to be deleted.
- Press <ENTER> to remove the view from the system.

View Deletion Process

Delete Department Views

The office manager and delegates can delete a view from an office.

A view may be deleted only if there are no Signer Desks, no Creator Desks, no routing paths and no units belonging to the view. So before trying to delete a view, you must use the appropriate screens to delete all of the attached entities.

When the view is deleted, the default Signer Desk, the default Creator Desk and the default routing path are automatically deleted.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Ac</u>	<u>tion Line</u>	
•	Office:	10 characters Indicate the <u>office from which the view is to be deleted</u> .
Vie	w Information	
•	Delete Views:	10 characters each Identify the <u>departmental view(s) to be deleted</u> .
	Messages:	30 characters Displays <u>messages that indicate whether the delete process was successful</u> or not.
Ad	ditional Functions	
	PF KEYS	See the Appendix for explanations of the standard PF Keys.

Delete an Electronic Office

Deleting an electronic office can be a arduous task because all the lower structures must be deleted first. Once all the desks and paths and views have been deleted, then you can use Screen 944 to delete an electronic office. Office Managers and Delegates have the ability to use this feature.



944 Office Delete	06/06/07 17:30
	CC 02
Screen: Office: PURCHASING	
Enter 'Y' to Delete: _	
Description: PURCHASING SERVICES	
Manager (UIN) : 5uuuuuuul YALE, YOLANDA Y	
Delegates (UIN) : 7uuuuuuu4 LANE, LEONA L	
Default Signer(UIN): 5uuuuuuu8 LEHR, LINDA L	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9	-PF10PF11PF12
Hmenu Helb EHelb	

Basic Steps

- Advance to Screen 944.
- Type the office to be deleted on the Action Line.
- Press <ENTER> to display the office description, the office manager's name and UIN, and the delegates' name(s)/UIN(s).
- Type 'Y' in the field labeled "Enter 'Y' to Delete:".
- Press <ENTER> to remove the office from the system.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

•	Office:	10 characters Indicate the <u>office to be deleted</u> .
٠	Enter 'Y' to Delete:	1 character Enter whether or not ('Y' or blank) you wish to <u>delete the office</u> .
<u>Sci</u>	reen Information	

Description: 40 characters Displays <u>text describing the office</u>.

Screen 944 – Office Delete (cont'd)

Manager (UIN):	9 digits/20 characters Indicates the <u>Universal Identification Number (UIN) and name of the office</u> <u>manager</u> .
Delegates (UIN):	9 digits/20 characters Displays the <u>Universal Identification Number (UIN) and name of the delegates</u> for the office manager.
Default Signer (UIN):	9 digits/20 characters Displays the <u>default Universal Identification Number (UIN)</u> which must be on all signer desks for this office

Additional Functions PF KEYS

See the Appendix for explanations of the standard PF Keys.

Section XII Special Functions

Special Routing Functions Purchasing Screens

Closing a document generally submits the document to Routing & Approvals.

Purchasing Screen 242 is used to close a Limited Purchase document. You should close the limited purchase document after all required information has been successfully entered in order to prevent changes from being inadvertently added. Closing a document will also encumber the necessary funds.

It is possible to close and re-open a limited purchase document multiple times in order to make changes as long as it has not entered the routing and approval system of FAMIS.



242 Limited Purchase Close	06/06/07 11:18
	FY 2007 CC 02
Screen: Doc: A711277 In Process	
Close Degument, Y	
Doc Summary: BUFFY'S CATERINGREFRESHMENTS	
Doc Year: 2007 Doc Date: 02/15/2007 Cat: LP Sta	te:
Dept: CHEN Sub Dept: Total Amt: 1148.75	
Vendor: IVVVVVVVV4 M & Z BAR-B-QUE DBA*BUFFI'S CA LDT Deimbunge Id.	
Reimburse 1d:	FOB:
USET REI: 500388-0058 AII Items Recel	ved: Y
Date Recei	ved: 02/16/2007
$Fnter_{PF1} = DF2 = DF3 = DF4 = DF5 = DF6 = DF7 = DF8 = DF9 = DF10$	DF11DF12
Umony Holp Fuelp Next Item Poute Pegal	rriiirriiz
Amenu Aerp EAerp Next Item Route Recar	Warns

After entering "Y" in the Close Document: field, a pop-up window will appear. Type 'Y' to submit the document into the routing system. Type 'N' when you don't want to route the document because you are waiting for further information but you want the money encumbered.



4	
ĺ	Type 'Y' to submit to Routing & Approval: _
	Additional Routing (FYI/FYA)
H	+

Type 'FYI' or 'FYA' if you want to route the document to someone "outside" the normal path.

Using the PF7 Key - Route

A closed document may be submitted to the routing and approval process by pressing the PF7 key. If the document is submitted for routing after it is closed, it cannot be reopened without recalling the document from routing.

The "PF7 Route" key is used if you have not routed the document at the time of close. It can also be used to initiate routing again for a document.

For **Requisitions**, you would use Screen 256 to close and route a document.

Screen 256 – Requisition Document Close

256 Requisition Document Close		06/06/07 11:21
Screen: Doc: R800104		FY 2007 CC 02
<< Dates >>		
Document: 05/25/2007 Cat: RO	User Ref: 2vvvvvvvv3	St Req:
Start : Contact P	erson: WYNNE WILSON	Ph: 979-888-7777
End : Buyer: S	SB BARNES, BRETT	Ph: 979-844-2222
Required: Research	(Y/N): N Type Funds: L	Type Order: HIED
Change : No. 00	Last Print Date:	
Sole Sour	ce: N Emergency: N	
Doc Summary: SUN EQUIPMENT M	AINTENANCE (MARCHBANKS-P700)397)
Total Amount: 93,208.00	Untransferred Total:	93,208.00
In Pr	ocess	
Close Dod	ument? Y	
	1	
Budget Balance Override: _	Socion: 1586JC	Date: 06/06/07
Enter-PF1PF2PF3PF4PF5	PF6PF7PF8PF9	-PF10PF11PF12
Hmenu Heip EHelp Nex	t Item Route	Warns

Exempt Purchase documents are closed and routed on Screen 237.

Screen 237 – Exempt Purchase Close

237 Exempt Purchase Close	06/06/07 15:18
	FY 2007 CC 02
Screen: Doc: E703487 In Process	
dlaga Dagunanta M	
Close Document: Y	
Doc Summary: FALL TUITION	
Doc Year: 2007 Doc Date: 09/01/2006 Cat: EP St	ate:
Dept: ANSC Sub Dept: Total Amt: 10925.	39
	m a1
Vendor: 3VVVVVVVIU TEXAS A&M UNIVERSITY LL	T Ca:
Reimburse 1d: Haar Daf. 510100 7024	FOB:
User Ref: 510100-7934 All items Rece	10001 $10/06/2006$
Date Rece	ived: 10/06/2006
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF1	0PF11PF12
Hmenu Help EHelp Next Item <mark>Route</mark> Recal	Warns

This screen is set up solely for use by <u>Security Officers</u> in the event that an office manager is not available to make necessary changes to the Signer Desks.

Exercising electronic signature authority is just like signing paper documents. <u>You must</u> <u>be authorized to sign</u>. With electronic documents, the computer audits who can and does sign the documents.

This screen allows you to have different signers for each different document form.

943	Secur	ity Signer	Desk Modify			06/06/07 17:28 CC 02
Scre	en: _	Office	PURCHASING	View:	PURCHASING	Form:
						Delete Desk: N
Desc	ripti	on:				_
Offi	ce Ma	r : YALE, Y	COLANDA Y			
Dogk		. STONED	DSK (Default	`		
DCDA		. Diomin	DDR (Deruure	,		
_	_					
Func	Туре	UIN	Name			
_	S	5uuuuuuu8	LANE, LINDA	L		
		8uuuuuuu0	JOEL, JOHNN	ΥЈ		
_		811111111111117	STILES SAD	AH C		
_	5	ouuuuuuu,	DIIMED, DAM			
-	-					
_	_					
_	_					
_	_					
_	_					
_	_					
_	_					
		****	*** End of list	E *****	*	
Enter-	PF1	-PF2PF3-	PF4PF5	-PF61	PF7PF8	PF9PF10PF11PF12
	Hmenu	Help EHel	Lp			
		-	-			

Screen 943 - Security Signer Desk Modify

Basic Steps

- Advance to Screen 943.
- Type a valid office and view name on the Action Line.
- Type a form name to modify or create signers for a specific form, such as "PLP".
- Press <ENTER> to display existing desk information.
- Add or update signer desk information in the available fields, as desired.
- Press <ENTER> to record the information.

Electronic Signature Process

Electronic Signatures

Modifying the electronic signatures permitted on a document is controlled at a special desk called the Signer Desk. A default signer is assigned when the office is created. The name for these desks is "SIGNER" plus its document form name, for example, SIGNER PRQ for requisitions.

The people on the Signer Desk are those that have signature authority on the accounts for the units assigned to the office and view. Signer Desks are only applicable at the department level.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Ac</u>	<u>tion Line</u>	
•	Office:	10 characters Indicate the <u>title of the office</u> governing a set of signer desks.
•	View:	10 characters Enter the <u>view governing</u> the set of <u>signer desks</u> .
	Form:	Help 3 characters Identify the <u>type of documents</u> that will be routed through a particular path. For example, requisitions only route through the path with form=PRQ.
	Delete Desk:	1 character Type 'Y' to <u>delete the desk</u> .
Sci	een Information	
<u></u>	Description:	40 characters Enter a <u>description for the office</u> listed.
	Office Mgr:	30 characters Shows the <u>name of the electronic office manager</u> for the office.
	Desk:	30 characters Shows the <u>name of the desk</u> in conjunction with the Office: field.
•	Func:	Help 1 character Identify the desired <u>function</u> : <u>A</u> dd an assignee, <u>D</u> elete an assignee, <u>P</u> osition a particular person at the top of the list, or Update an assignee.
•	Туре:	Help 1 character Indicate if the person is a <u>primary approver (blank) or substitute approver ('S')</u> on the desk.
•	UIN:	Help 9 digits Identify the <u>Universal Identification Numbers (UIN)</u> for the people assigned to the desk.
	Name:	32 characters Displays the <u>name associated with the UIN</u> .

Additional Functions

PF KEYS See the Appendix for explanations of the standard PF Keys.

Desk Copy

The ability to copy an Approver Desk (created on Screen 922) with all its attached approvers to a new desk is available using Screen 930. The new desk can then be modified as necessary, but the need to re-key all the approvers is eliminated.

The copy function is not available for Signer Desks or Creator Desks.

Screen 930 – Desk Copy

930 Desk Copy	06/06/07 17:07
	CC 02
Screen: Office: PURCHASING Desk: ADMIN-B2	
Copy to Desk -	
Name: ADMIN-B3	
Description: ADMINISTRATIVE BUYER 3	
Enter-PF1PF2PF3PF5PF6PF7PF8PF9PI	?10PF11PF12
Hmenu Help EHelp	

Basic Steps

- Advance to Screen 930.
- Type the name of the office and desk you would like to copy from on the Action Line and press <ENTER>.
- Type the name and description of the desk you would like to create and press <ENTER> to record the information on the new desk.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

•	Office:	10 characters Indicate the <u>title of the office</u> to be copied.
•	Desk:	10 characters Identify the <u>desk to copy</u> .

Screen Information

Copy to Desk: 1 character Type 'Y' to copy.

•	Name:	10 characters Indicate the <u>name of the desk</u> you would like to create.
٠	Description:	43 characters Enter a <u>description of the new desk</u> .

Additional Functions

PF KEYS

See the Appendix for explanations of the standard PF Keys.

Add SubDepartment to Routing Structure

Add SubDepartment to Routing Structure

Create SubDept Screen 860	If the SubDept does not already exist on the Department Table, you must create it so it is valid.
Add New Unit to Office Screen 941	The new Unit (Department/SubDepartment combination) must be added to the Office and Exec Level, if required.
Add New Unit to View Screen 920	Add the New Unit to the Department View to which it belongs.
Create Desks Screen 922	Create any new desks that are needed for the SubDept routing.
Add Path(s) Add Desks to Paths Screen 921	Add a new path using the Unit and add the desks for that path.

Electronic Document Profiles

A profile is created for each form of electronic document; this establishes some of the rules for the routing of the documents. Screen 950 is used to add, update and delete these profiles.

This screen is maintained and updated by <u>FAMIS Services</u>. The information is campus specific.

ne mormation is campus specifie.

To make modifications to this screen, send a **Change / Enhancement request** to FAMIS Services: <u>http://system.tamus.edu/offices/famis/requests/chgform.aspx</u>

Screen 950 - Electronic Documents Profile

9	950 Electronic Documents Profile 06/06/07 17:28					28				
s	cree	en:	Form:	_						2
							PA	ANEL: C	1MORE>>	
				Review by	Processing	Required		Route		
F	'unc	Form	Description	Proc Unit	Unit View	Approvals	Cat	Level	Exp Dt	
-										
	_	DBR	DEPT BUD REQ	Y	DBR OFFICE	SIGNER	AM	D		
	_	EBR	BUDGET EPA	Y	PAYROLL	SIGNER		D		
	_	EGR	GRAD EPA	Y	PAYROLL	SIGNER		D		
	_	EWR	WAGE EPA	Y	PAYROLL	SIGNER		D		
	_	PBD	BID	Y	PURS	NONE		Р		
	_	PEP	EXEMPT PURCH	N		SIGNER	AM	D		
	_	PIP	INVOICE PROB	N		SIGNER	AM	D		
	_	PLP	LIMITED PRCH	N		SIGNER	AM	D		
	_	PPO	PURCH. ORDER	Y	PURS	NONE		Р		
	_	PRQ	REQUISITION_	Y	PURS	SIGNER	AM	D		
	_			_				_		
	_			_				_		
	-			.				_		
	*** End of list ***									
Ent	er-I	?F1	-PF2PF31	PF4PF5	-PF6PF7	-PF8PF9-	PF1	L0PF1	1PF12	
	F	Imenu	Help EHelp				Lef	Et Rig	ght	

Basic Steps

- Advance to Screen 950.
- Type a document form on the Action Line and press <ENTER> to display existing profile information.
- Indicate whether you wish to add, update, or delete profile information.
- Add or modify information as needed and press <ENTER> to record the information.

Profile Process

Defining Document Profiles

The FAMIS Services department is the office that maintains all of the electronic document profiles. All changes to the rules for a particular form will be processed through that office. If you need changes made to your profiles you may send your requested change via e-mail to FAMISHELP@TAMU.EDU, you may fax us your request at (979) 458-6455, or you may call the FAMIS Hotline at (979) 458-6464.

Program XXUPDOFF must be run in FAMISU to change Screen 950.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>			
Form:	3 characters		
	Indicate the <u>document type</u> to be displayed at the beginning.		
Screen Information			
Panel 1			
Func:	Help 1 character FAMIS Services Entry		
	Identify the desired <u>function</u> : <u>A</u> dd a new profile, <u>U</u> pdate an existing profile,		
	<u>D</u> elete an existing profile, or <u>P</u> osition a profile at the top of the screen.		
Form:	3 characters FAMIS Services Entry		
	Enter the type of document whose profile is to be created/modified.		
Description:	12 characters FAMIS Services Entry		
••••	Further describe the type of document whose profile is added/modified.		
Review by	1 character EAMIS Services Entry		
Proc Unit:	Indicate whether or not ('Y' or 'N') review by a processing unit is required.		
Due en esta e la it			
View:	Identify the unit that must process these forms, if review is required.		
Required	Help 10 characters FAMIS Services Entry		
Approvals:	Indicate the <u>type and number of approvals needed</u> for the form type.		
Cat:	Help 2 characters FAMIS Services Entry		
	Include whether or not the Amount Over (AM) for dollar limit category is used		
	for the document type. Valid values are:		
	Blank = No category		
	AM = Amount Over		
	DA = Days Over (DCRs only)		
Route Level:	Help1 character FAMIS Services Entry		
	Indicate whether routing begins at the Processing or Departmental office level.		
Evn Dt.	10 characters		
	Enter the expiration date used to suppress new documents from being routed		
	for a form. Used to phase out a routing document form.		
Panel 2			
	10 characters		
Unice.	Identify the office to which the department is linked.		

Screen 950 – Electronic Documents Profile (cont'd)

View: 10 characters Displays the <u>view within the departmental office this unit belongs to</u>.

Additional Functions

PF KEYS See the Appendix for explanations of the standard PF Keys.

Section XIII Detail of FAMIS Screens User Perspective

The document Inbox displays all the documents awaiting your action. Documents listed on this screen may be there because they:

- are on a routing desk on which you serve as a primary assignee, or
- have been forwarded to you specifically for approval or review, or
- have been referenced back to you as the creator.

When someone routes or re-routes a document, they have the ability to send the document as an "FYI" or "FYA" to an additional person or desk. This allows the submitter to route the document for additional approval before the document goes to the next desk or Signer Desk.

Documents will appear in the following order:

- 1. FRA/FYA documents. This will include any documents (including "rejects" and "recalls") routed to an individual.
- 2. All Desk routed documents
- 3. Information/Notification copies of documents.

Within each of these groups, the documents are displayed in document-ID order.

The PF keys and some of the fields displayed on Routing & Approvals screens **WILL BE DIFFERENT DEPENDING OF THE TYPE OF DOCUMENT YOU ARE VIEWING**. For example, a PIP document will display differently than a BID document.

Also, if you don't have approval authority for a particular document, you **WILL NOT SEE the Action: field on the Cover Sheet**.

Section I – Main Screen

Screen 910 -	Document Inbox	(Panel 1	۱

910 Document In-Box 09/15/09 13:24			
Screen: Document: _	Office:	Desk:	CC AM
	Approvals Only: N	Panel: 01	More>>
	A	Requested	
Sel Document ID N	Doc Summary	Action	Status
_ PRQSAR000013 * COPIER	RENTAL FOR 4-1-00 THROUG	H 8- FYA/Approve	FYA/FRA Rt
_ PLPAML400008 * COFFEE		Revise	Rejected
<pre>_ PRQSAR000009 * FURN</pre>			
<pre>_ PRQSAR000019 * REN1 T</pre>	'vpe 'Y' to view only docu	ments for approv	al. ^{led}
_ PRQSAR000024 * FURN	,pe : te :.e e,		
<pre>_ PRQSAR000024 * FURNITU</pre>	JRE FOR MY OFFICE	Ntfy/Final	Final
<pre>_ PRQSAR000030 * DR. JOH</pre>	IN JONES' ORBITAL SHAKER	Ntfy/Signed	In Proc Rt
_ PLPSAL000006 * OFFICE	FURNITURE	Notify	Recalled
PLPSAL000075 MAHOGAN	IY DESK	Notify	Recalled
PROSAR100001 * COMPUTE	ER MONITOR FOR JULIE JENS	EN Notify	Rejected
PROSAR100004 RENTAL	OF XEROX COPIER 1090 FOR	9/1 Ntfy/Signed	In Proc Rt
_ PRQSAR100006 COMPUTE	ER MONITOR FOR JULIE JENS	EN Ntfy/Signed	In Proc Rt
*** End of List	12 Document(S) Found ***		
Enter-PF1PF2PF3PF	74PF5PF6PF7PF	'8PF9PF10PH	11PF12
Hmenu Help EHelp	Discd RHist Se	el All Left Ri	ght

Screen 910 - Document Inbox (Panel 2)

910 Document I	n-Box		09	/15/09 13:25
				CC AM
Screen: D	Ocument:	Office:	Desk:	
< <more< td=""><td>Appr</td><td>ovals Only: N</td><td>Panel: 02</td><td>More>></td></more<>	Appr	ovals Only: N	Panel: 02	More>>
			-	Current
Sel Document ID	FY Submitted	l by Submitted	Arrived C	C Unit
	·			
_ PRQSAR000013	3 2000 STRIKER, SONI	DRA S 03/27/2000	03/27/2000	INRE FAMIS
_ PLPAML400008	3 2004 JENSEN, JULIE	J 11/13/2006	09/02/2008	
_ PRQSAR000009	2000 JENSEN, JULIE	з 03/27/2000	04/18/2000 S	A
_ PRQSAR000019	2000 JENSEN, JULIE	з 03/27/2000	03/28/2000 S	A
_ PRQSAR000024	2000 JENSEN, JULIE	з 03/27/2000	04/03/2003	
_ PRQSAR000024	2000 JENSEN, JULIE	з 03/27/2000	11/06/2003	
_ PRQSAR000030	2000 JENSEN, JULIE	з 03/28/2000	06/23/2008 S	A
_ PLPSAL000006	5 2000 JENSEN, JULIE	з 03/28/2000	03/29/2000 S	A
_ PLPSAL000075	5 2000 JENSEN, JULIE	з 03/28/2000	03/28/2000 S	A
_ PRQSAR100001	2001 JENSEN, JULIE	J 11/21/2000	04/03/2003 S	A
PRQSAR100004	2001 JENSEN, JULIE	J 11/21/2000	06/23/2008 S	A
PRQSAR100006	2001 JENSEN, JULIE	J 11/21/2000	06/23/2008 S	A
*** En	d of List 12 Docume	ent(S) Found ***		
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12				
Hmenu Help	EHelp	Discd RHist Sel	All Left R	ight



Screen 910 - Document In-Box (Panel 3)

Document Inbox Processes

Position the Display

The Document, Office and Desk fields can be used to filter the display of documents shown on the screen. For example, if you type "PRQ*" in the Document: field on the Action Line, the screen will display all the requisition documents in your Inbox. Press PF11 to scroll to the right and view additional information.

If you wish to view documents on desks where you serve as a substitute, you would go to <u>Screen</u> <u>911</u>, key in the name for a primary approver on the desk and press <ENTER>.

Basic Steps

Approve or Reject Documents

- Advance to Screen 910.
- Press <ENTER> to scroll through documents in your Inbox.
- Type an 'X' next to all documents you would like to approve and press PF8. -OR-
- Press PF9 to select all of the documents in your Inbox.
- This will bring up the Routing Document Information Pop-Up Window.
- Type **APP** in the Action: field, type 'Y' in the pop-up box to confirm that you would like to <u>approve</u> the document and press <ENTER>.
- If you are <u>rejecting</u> a document, type **REJ** in the Action: field, enter the reason that you are rejecting the document in the pop-up window provided and press <ENTER> to return the document to its creator.
- This will return you to the Routing Document Information window. Press PF5 to move to the next document or press PF4 to return to Screen 910.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>	
Document:	12 characters/digits
	Enter the document number, if known, or leave blank to display all documents.
	You can also use wildcards to search for types of documents (such as PP*).
Office:	10 characters
	Enter the <u>title of the electronic office</u> for the documents awaiting action. Must
	be used in conjunction with the Desk: field.
Desk:	10 characters
	Type the name of the desk where the documents are awaiting action. Must be
	used in conjunction with the Office: field.
Approvals Only:	1 character
	Indicate whether or not ('Y' or 'N') to <u>display only</u> items that need to be
	approved.
Screen Information	
Panel 1	
Sel:	1 character
	Type an 'X' in this field and press PF8 to select a document for further review.
Document ID:	12 characters/digits
	Displays the document identification number used in routing and approval;
	consists of the form (3 characters) + the campus code (2 digits) + the document
	number (7 character/digits).

Screen 910 – Document Inbox (cont'd)

N:	1 character An asterisk (*) indicates that <u>routing notes</u> are <u>attached to the document</u> .		
Doc Summary:	40 characters/digits Displays a summary <u>description</u> of the <u>document</u> .		
Requested Action:	11 characters Shows the <u>requested action</u> that needs to be taken on the document.		
Status:	14 characters Identifies status of the <u>document's progress through the Routing and Approval</u> <u>system:</u> Blank = In Process CN = Cancelled CO = Completed DR = In Dept routing ER = In Exec routing FN = Final FY = FYA/FRA routing PR = In Proc routing RC = Recalled RJ = Rejected		
Panel 2 FY:	4 digits Indicates the <u>fiscal year</u> that the document was created.		
Submitted by:	21 characters Shows the <u>name of the person who submitted the document</u> for routing and approval.		
Submitted:	8 digits Identifies the <u>date the document was submitted</u> for routing and approval.		
Arrived:	8 digits Shows the <u>date the document arrived</u> at the Inbox.		
Current			
CC:	2 digits Indicates the current location of the document by TAMUS member <u>campus</u> <u>code</u> .		
Unit:	10 characters Identifies the <u>current department/sub-department</u> in which the document is being routed.		
Panel 3			
Current			
Office:	10 characters Displays the <u>current office</u> the document is being routed through.		

Screen 910 – Document Inbox (cont'd)

Desk:	10 characters Indicate the <u>current desk/UIN</u> the document is awaiting action from.	
View:	10 characters Displays the <u>name of the view</u> where a person has approval authority or signer or creator desk. This is only applicable to signer/ creator desks.	
Additional Functions		
PF KEYS	See the Appendix for a detailed description of the standard PF keys.	
PF6	Discard	
Discd	Discards the selected document(s) from the In-Box.	
PF7	Routing History	
RHist	Displays the <u>routing history</u> of the document and shows who has seen it.	
PF8	Select	
Sel	Displays the Routing Document Information pop-up window for the document(s) you have selected.	
PF9	Select All Documents	
All	Selects all the documents in your In-Box and displays the routing document information pop-up window. The documents are displayed sequentially.	

Section II – Cover Sheet Pop-Up Window

This is the cover sheet of the document. From this screen you can view all the information about the document and you can take action on the document.

If routing notes exist, a message **'*ROUTING NOTES*'** will be displayed near the top of the screen. If not, there will be no message.

Screen 910 – Cover Sheet Window

Screen:

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Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line

Action:

3 characters Enter the <u>action wish to take on the document</u>. If you don't have approval authority, you will not see this field displayed.

If routing notes exist, a message **'*ROUTING NOTES*'** will be displayed near the top of the screen. If not, there will be no message.

Doc ID:

12 characters/digits

Displays the <u>document identification number</u> used in Routing & Approval; consists of Form (3 characters), Campus Code (2 digits), Document Number (7 character/digits).

Screen 910 – Document Inbox (cont'd)

Status:	14 charactersIndicates document's progress through the Routing & Approval system:Blank =In ProcessCN =CancelledCO =CompletedDR =In Dept routingER =In Exec routingFN =FinalFY =FYA/FRA routingPR =In Proc routingRC =RecalledRJ =Rejected		
Requested Action:	12 characters Displays the <u>requested action</u> that needs to be taken on the routed document.		
Doc. Summary:	40 characters Displays a <u>summary description</u> taken from the original document.		
Released:	8 digits Identifies the <u>date the document was released to Routing & Approval system</u> .		
by:	25 characters Shows the <u>name of</u> the <u>person routing the documents</u> .		
(Type of Document):	7 characters/digits Displays the <u>type of document and indicates the identification number</u> (i.e., "Limited Purch" and document number.)		
Contact Person:	25 characters Identifies the name of the <u>person to contact</u> about the document.		
Dept Name:	25 characters <u>Name of first department</u> listed on the purchasing document header.		
Doc Total:	15 digits Shows <u>total dollar amount on the purchasing document before any transfers</u> are processed.		
Untransferred Total:	15 digits Identifies the <u>total dollar amount</u> on purchasing document that has <u>not been</u> <u>transferred</u> to another document.		
Additional Functions			
PF KEYS	See the Appendix for a detailed description of the standard PF keys.		
PF4	Exit Cover Sheet Pop-Up Window		
Exit	Used to exit the Cover Sheet pop-up window and return to Screen 910.		
PF5	Next Document		

NDoc Used to view the <u>next document</u> selected.

Screen 910 – Document Inbox (cont'd)

PF6	Document Summary
Summ	View the <u>document summary</u> information.
PF7 RHist	Routing History Displays the <u>routing history</u> of the document to track where a document is in the routing process
PF8	Audit Information
Audit	Shows the <u>audit trail of who created or modified document</u> .
PF9 Notes	Notes Displays a pop-up window to select the <u>type of notes</u> to view: Document Notes or Routing Notes. Select type of notes to view by typing 'X' and press <enter>.</enter>
PF10	Document Header Extended Information
Headr	Displays the <u>document header extended information</u> for the document.
PF11	Line Items
Items	Shows information about the <u>line items</u> on the document.
PF12	Document Tracking
Track	Identifies the <u>actions taken</u> on the document.

Substitute Inbox

If you are a substitute on an approval desk, you will not receive documents directly to your document In-Box (displayed on Screen 910).

To see the documents at a desk where you are a substitute, advance to Screen 911 and enter the name of the desk's **primary assignee** and press <Enter>. The name search will allow you to choose the correct person and display this person's In-Box.

The documents in the In-Box which are on desks to which you are assigned will be accessible. Others will be protected and you may not select them.

Security element "10" allows security officers, and certain members of the Purchasing Office/Fiscal Office to have viewing access to the cover sheet and all routing documents on Screens 911 and 913 in order to provide assistance in resolving routing and approval problems.

Section I – Main Screen

Documents will appear in the following order:

- 1. FRA/FYA documents. This will include any documents routed to an individual. Rejects and Recalls fall into this category.
- 2. All Desk routed documents
- 3. Information/Notification copies of documents

Within each of these groups the documents are displayed in document-ID order.

Sereen SII Document inbox by Name (Faller	±)
911 Document In-Box by Name LAWRENCE, LINDA L	09/15/09 13:36 CC AM
Screen: Name: Document: Document: Approvals Only: P	Panel: 01 More>> Requested
	Ntfy/Signed In Proc Rt Ntfy/Final Final Ntfy/Final Final Ntfy/Final Final Ntfy/Signed In Proc Rt Ntfy/Final Final
Type 'Y' to view only d *** End of List 6 Document(S) Found *** Enter-PF1PF2PF3PF4PF5PF6PF7PF8 Hmenu Help EHelp Discd RHist Sel	ocuments for approval. -PF9PF10PF11PF12 All Left Right

Screen 911 - Document Inbox by Name (Panel 1)

	Screen 911 -	Document	In-Box by	/ Name	Panel 2)
--	--------------	----------	-----------	--------	---------	---

		-	-	-		_
911 Document In-	-Box by Name			(09/15/09 13:47	
	LAWRENCE, LIP				CC AM	
Screen: Nar	me:	D	ocument:			
< <more< td=""><td></td><td>Approva</td><td>ls Only: N</td><td>Panel: (</td><td>02 More>></td><td></td></more<>		Approva	ls Only: N	Panel: (02 More>>	
					Current	
Sel Document ID	FY Submitte	ed by	Submitted	Arrived	CC Unit	
EBRSA0001911 2	2005 LAWRENCE, L1	INDA L	11/04/2004	06/23/2008	SA	
	2004 LAWRENCE, LI	INDA L	09/21/2004	06/23/2008		
	2004 LAWRENCE, LI	INDA L	09/21/2004	06/24/2005	SA	
PT.PSAT.400090	2004 LAWRENCE LI	INDA T.	09/21/2004	06/23/2008		
			11/04/2004	06/23/2008	C A	
_ EWRSA0001915 2	2005 LAWRENCE, LI		11/04/2004	00/23/2008	5A	
_ EBRSA0001917 2	2005 LAWRENCE, LI	LNDA L	11/04/2004	07/10/2008		
*** End	of List 6 Docume	ent(S) Foun	d ***			
Enter-PF1PF2	-PF3PF4PF5-	PF6PF	7PF8F	F9PF10-	-PF11PF12	
Hmony Holp	Fuelp	Digad PU	igt gol N	11 Toft	Dight	
mienu herp	PUETA	DISCU RH	TRC Del A	LT LEIL	KIGHC	





Basic Steps

Approve or Reject Documents

- Advance to Screen 911.
- Press <ENTER> to scroll through documents in the In-Box.
- Type an 'X' next to each document you want to approve and press PF8. <u>-OR-</u>
- Press PF9 to select all of the documents in your In-Box.
- This will bring up the Routing Document Information Pop-Up Window.
- Type **APP** in the Action: field, type 'Y' in the pop-up box to confirm that you would like to <u>approve</u> the document and press <ENTER>.
- If you are <u>rejecting</u> a document, type **REJ** in the Action: field, enter the reason that you are rejecting the document in the pop-up window provided and press <ENTER> to return the document to its creator.
- This will return you to the Routing Document Information window. Press PF5 to move to the next document requiring action or press PF4 to return to Screen 911.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

See Screen 910 for field descriptions and PF Keys.

Section II – Cover Sheet Pop-Up Window

This is the cover sheet for the document. From this screen you can view all the information about the document and you also take action on the document.

++	
Screen: 09/15/09 13:57	
*** Purchasing Document Cover Sheet *** CC AM	
Action:	
Doc ID: PLPSAL 0090 Status: Final	
Requested Action:	
Doc Summary: PENTIUM 3 COMPOTERS	
Released: 09/21/2004 by: LAMPENCE, LONA L	
Limited Purch : L40009 Contact Person: Dept Name: FAMIS Doc Total: Contact Person:	
PF4PF5PF6PF7PF8PF9PF10PF11PF12	
Exit NDoc Summ RHist Audit Notes Headr Items Track	
++	

Screen 911 – Cover Sheet Window

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

Action:

3 characters

Enter the <u>action</u> you wish to take on the document.

If you don't have approval authority, you will not see this field displayed.

If routing notes exist, a message '*ROUTING NOTES' will be displayed near the top of the screen. If not, there will be no message.)

Screen Information

Doc ID:	12 characters/digits Displays the <u>document identification number</u> used in Routing & Approval; consists of Form (3 characters), Campus Code (2 digits), Document Number (7 character/digits).		
Status:	14 charactersIndicates status of document's progress through the Routing and Approvalsystem:Blank =In ProcessCN =CancelledCO =CompletedDR =In Dept routingER =In Exec routingFN =FinalFY =FYA/FRA routingPR =In Proc routingRC =RecalledRJ =Rejected		
Requested Action:	12 characters Displays the <u>requested action</u> that needs to be done with the routed document.		
Doc. Summary:	40 characters Shows a <u>summary description</u> taken from the original document.		
Released:	8 digits Identifies the <u>date</u> the document was <u>released to routing</u> .		
by:	25 characters Shows the name of the <u>person routing the documents</u> .		
(Type of Document):	7 character/digits Displays the <u>type of document and</u> indicates the <u>identification number</u> (i.e., "Limited Purch" and document number.)		
Contact Person:	25 characters Identifies the name of the <u>person to contact</u> about the document.		

Screen 911 – Document Inbox by Name (cont'd)

Dept Name:	25 characters <u>Name of first department</u> listed on the purchasing document header.
Doc Total:	15 digits Indicates the <u>total dollar amount on the purchasing document before any</u> <u>transfers</u> are processed.
Untransferred Total:	15 digits Identifies the <u>total dollar amount on purchasing document</u> that has <u>not</u> been <u>transferred</u> to another document.
Additional Function	ons for Cover Sheet
PF KEYS	See the Appendix for a detailed description of the standard PF keys.
PF4	Exit Cover Sheet Pop-Up Window
Exit	Used to exit current the Cover Sheet pop-up window and return to Screen 910.
PF5	Next Document
NDoc	Used to view the <u>next document</u> selected.
PF6	Document Summary
Summ	View the <u>document summary</u> information.
PF7	Routing History
RHist	Displays the <u>routing history</u> of the document to track where a document is in the routing process.
PF8	Audit Information
Audit	Shows audit trail of who created and modified the document.
PF9	Notes
Notes	Displays a pop-up window to select the type of <u>notes</u> to view: Document Notes or Routing Notes. Type "X" to select and press <enter> to view notes.</enter>
PF10	Document Header Extended Information
Headr	Displays the document header extended information for the document.
PF11	Line Items
Items	Shows information about the <u>line items</u> on the document.
PF12	Document Tracking
Track	Identifies the <u>actions taken</u> on the document.

Document Outbox

The document Outbox displays all the documents that you have taken action on and lists them in order of the date the action was taken. You can filter the data by using the "Date From" and "Date To" fields. Use the "Include Finished" field to determine the documents to be displayed: type 'Y' to <u>include</u> finished documents; type 'N' to <u>exclude</u> them.

Screen 912 - Document (Dutbox ((Panel	1)	
-------------------------	-----------------	--------	----	--

912 Document Out-Box	(09/15/09 13:59
		CC AM
Screen: Document: Inc	lude Finishe	d: Y
Actions From: 08/16/2000 Thru: 09/15/2009		
	Pane	el: 01 More>>
Sel Document ID N Doc Summary	Status	Action
PLPAML400006 * CANDY FOR HALLOWEEN	Final	Discarded
PLPAML400008 * COFFEE	Rejected	Submitted
PLPAML400006 * CANDY FOR HALLOWEEN	Final	Submitted
_ PBDAMB000003 FURNITURE FOR BUYERS	Cancelled	Cancelled
_ PLPSAL000030 LEATHER CHAIR	Cancelled	Discard/Cncl
<pre>_ PLPAML000305 * OFFICE FURNITURE</pre>	Cancelled	Discard/Cncl
PLPSAL000022 NET DIALOG	Final(CO)	Deleted
_ PLPAML100143 CHEMICALS	In Dept Rt	Approved
_ PRQSAR100004 RENTAL OF XEROX COPIER 1090_FOR 9/	In Proc Rt	Approved
_ PRQSAR100006 COMPUTER MONITOR FOR JULIE JONES	In Proc Rt	Approved
*** End of List 10 Document(S) Found ***		
Enter-PF1PF2PF3PF4PF5PF6PF7PF8	-PF9PF10	-PF11PF12
Hmenu Help EHelp Recal RHist Sel	Notes Left	Right



912 Document Out-Box 09/15,	/09 14:02
	CC AM
Screen: Document: Include Finished: Y	
Actions From: 08/16/2000 Thru: 09/15/2009	
< <more 02<="" panel:="" td=""><td>2 More>></td></more>	2 More>>
Sel Document ID Action Date/Time Form Name FY Submitted	l by
_ PLPAML400006 06/07/2007 11:19 LIMITED PRCH 2004 CARSON, CARL	A C
_ PLPAML400008 11/13/2006 15:01 LIMITED PRCH 2004 CARSON, CARL	A C
_ PLPAML400006 11/13/2006 14:57 LIMITED PRCH 2004 CARSON, CARLA	A C
_ PBDAMB000003 03/04/2004 14:53 BID 2000 YEATS, YOLANI	DA Y
_ PLPSAL000030 01/13/2004 17:04 LIMITED PURC 2000 CARSON, CARLA	A C
_ PLPAML000305 12/15/2003 14:11 LIMITED PRCH 2000 CARSON, CARLA	A C
_ PLPSAL000022 07/13/2001 00:00 LIMITED PURC 2000 CARSON, CARLA	A C
_ PLPAML100143 12/08/2000 14:11 LIMITED PRCH 2001 CARSON, CARLA	A C
_ PRQSAR100004 11/21/2000 15:53 REQUISITION 2001 CARSON, CARLA	A C
_ PRQSAR100006 11/21/2000 15:52 REQUISITION 2001 CARSON, CARL	A C
*** End of List 10 Document(S) Found ***	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11-	PF12
Hmenu Help EHelp Recal RHist Sel Notes Left Right	t

Screen 912 - Docu	intent Out-Du		
912 Document Out-B	Box		09/15/09 14:06 CC AM
Screen: Docum	ent:	Incl	ude Finished: Y
Actions F	rom: 08/16/2000	Thru: 09/15/2009	
< <more< td=""><td></td><td></td><td>Panel: 03</td></more<>			Panel: 03
Sel Document ID S	ubmitted Fini	shed	
_ PLPAML400006 1	1/13/2006	Z	
_ PLPAML400008 1	1/13/2006	1	
_ PLPAML400006 1	1/13/2006	Z	
_ PBDAMB000003 0	2/10/2000	4	
_ PLPSAL000030 0	3/28/2000	1	
_ PLPAML000305 0	3/20/2000	1	
_ PLPSAL000022 0	3/21/2000	Z	
_ PLPAML100143 1	.2/08/2000	1	
_ PRQSAR100004 1	.1/21/2000	1	
_ PRQSAR100006 1	.1/21/2000	1	
*** End of	List 10 Documen	c(S) Found ***	
Enter-PF1PF2PF	'3PF4PF5	-PF6PF7PF8	PF9PF10PF11PF12
Hmenu Help EH	Ielp Recal	RHist Sel	Notes Left Right

Screen 912 - Document Out-Box (Panel 3)

Basic Steps

- Advance to Screen 912.
- Optionally, complete the Action Line information to limit the display to a specific type of document and press <ENTER> to display all of the documents that you have take action on.

Routing Process

Browsing Your Outbox

The current status and location of a document and when it arrived there can be checked using your Outbox.

Various pop-up screens are available using the PF keys at the bottom of the screen. To access this information, type an 'X' in the Sel field or position the cursor anywhere on the line of the desired document and press the PF key that indicates the information/action you want. For example, pressing PF8 will display a pop-up window with document routing information about the document, whereas PF7 will display routing history information.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line	
Document:	12 characters
	Enter the <u>routing document number</u> to be positioned on the first line of the display.
Include Finished:	1 character Indicate whether or not ('Y' or 'N') to <u>include finished documents</u> that have completed routing.

	Actions From:	8 digits The default is one month back, but this can be changed to <u>view documents</u> <u>within a specified date range</u> .
	Thru:	8 digits The default is one month back, but this can be changed to <u>limit the date range</u> <u>when displaying documents</u> .
<u>Scr</u> Par	r <u>een Information</u> nel 1	
•	Sel:	1 character Type 'X' to <u>select documents</u> one at a time.
	Document ID:	12 characters/digits Shows the <u>document identification number</u> used in Routing and Approval which consists of the Form (3 characters), Campus Code (2 digits), and Document Number (7 character/digits).
	N:	1 character An asterisk (*) indicates <u>routing notes are attached to the document</u> .
	Doc Summary:	34 characters Displays a <u>summary description</u> taken from entry of the original document.
	Status:	14 characters Identifies the status of the document as it relates to the user. For example: Blank = In Process CN = Cancelled CO = Completed DR = In Dept routing ER = In Exec routing FN = Final FY = FYA/FRA routing PR = In Proc routing RC = Recalled RJ = Rejected
	Action:	14 characters Shows the <u>last action taken on the document in the routing process</u> .
Par	nel 2 Action Date/Time:	12 digits Identifies the <u>date and time</u> document was <u>sent to the Outbox</u> .
	Form Name:	12 characters Indicates the <u>document form name</u> : requisition, purchase order, limited purchase order, bid, or exempt purchase order.
	FY:	4 digits Shows the <u>fiscal year</u> for the document.

Screen 912 – Document Outbox (cont'd)

Submitted by:	21 characters Displays the <u>name of the person who submits the document for approval</u> .
Panel 3	
Submitted:	8 digits Identifies the <u>date the document was submitted for approval</u> .
Finished:	1 character 'Y' indicates whether the document has <u>finished the routing process</u> .
Additional Eunctio	nc
PF KEYS	See the Appendix for explanation of the standard PF Keys.
PF5	Recall Document
Recal	Recall the document back to your Inbox.
	This is valid for only the creator of the document and the last person who approved the document.
	A recall reason (note) is required . If the user is the creator, all approvals and other actions are erased. However, routing notes will be retained. If resubmitted to routing, the approvals must start over.
DE7	Routing History
RHist	Used to display the <u>routing history</u> of the document. See Screen 914. Auto approves are designated by "(A)".
PF8	Select
Sel	After selecting document(s), displays the Purchasing Document Cover Sheet.
PF9	Routing Notes
Notes	Displays routing notes on the document.
Substitute Outbox

Screen 913 displays all the documents that another user has taken action on and lists them in order of the date the action was taken. The current status and location of a document may be checked using this screen. Use the "Include Finished" field to determine the documents to be displayed: type 'Y' to <u>include</u> finished documents; type 'N' to <u>exclude</u> them.

This screen will be helpful for security officers and Purchasing Office/Fiscal Office personnel who may need special access for troubleshooting and help desk functions.

Security element "10" allows viewing access to the Cover Sheet and all routing documents on Screens 911 and 913 in order to provide assistance in resolving routing and approval problems.

Screen 913 – Document Outbox by Name (Panel 1)

91	L3 Document Ou	-Box by Name LAWRENCE, LINDA L		09/15/09 14:07 CC 02
Sc	reen: Na	A:	Document:	00 01
50	Actions En	$\sim 08/16/2000$ Thrue 09/	15/2000 Include Finic	wheele W
	ACCIONS FI	m: 08/16/2009 1111u: 09/	13/2009 Include Finis	
			Pa	nel: UI More>>
Sel	Document ID	Doc Summary	Status	Action
_	PLP02Z911242	FREIGHT	Final	Approved
_	DBR02U907178	TRANSFER OVERREALIZED I	NCOME Final	Discarded
_	PLP02Z911006	PROPERTY REFUND	Final	Approved
_	PLP02Z911099	DOMESTIC MAIL CHARGES	M900557 Final	Approved
	DBR02U907188	transfer of fund balance	e Final	Discarded
_	EWR020478035	EWR: Karl Koonze - Wage	Position Final	Approved
_	EWR020478018	EWR Darryl Donaldson -	Wage Posit Final	Approved
-	EWD020478006	EWD. Erip Edwards - Was	a Bogition Final	Approved
-	EWR020478000	EWR: EIII Edwards - Way	e Position Final	Approved
-	EWR020477994	EWR: Anna Andrews - Wag	e Position Final	Approved
_	EWR020477986	EWR: Janice Jefferson -	Wage Posit Final	Approved
_	EWR020477964	EWR: Roland Richter - W	age Positio Final	Approved
_	EWR020478037	EWR: Joan Jewel - Wage	Position Final	Approved
	*** Pres	ENTER To View More Docu	ments ***	
Ente	er-PF1PF2	PF3PF4PF5PF6	PF7PF8PF9PF10	PF11PF12
	Hmenu Help	EHelp Recal	RHist Sel Notes Left	Right

Screen 913 - Document Outbox by Name (Panel 2)

913 Document Out-Box by Name		09/15/09 14:11
LAWRENCE, LINDA	A L	CC 02
Screen: Name:	Documen	it:
Actions From: 08/16/2009 Thr	u: 09/15/2009	Include Finished: Y
< <more< td=""><td></td><td>Panel: 02 More>></td></more<>		Panel: 02 More>>
Sel Document ID Action Date	Form Name	FY Submitted by
<pre>_ EWR020467243 08/24/2009 10:46</pre>	WAGE EPA	2009 RHINE, RHONDA R
<pre>_ EWR020467271 08/24/2009 10:46</pre>	WAGE EPA	2009 RHINE, RHONDA R
_ PLP02Z908070 08/19/2009 17:21	LIMITED PRCH	2009 WOODS, WYNONA W
_ PLP02Z908084 08/19/2009 17:21	LIMITED PRCH	2009 WOODS, WYNONA W
<pre>_ PLP02Z908095 08/19/2009 17:20</pre>	LIMITED PRCH	2009 WOODS, WYNONA W
<pre>_ PLP02Z908104 08/19/2009 17:20</pre>	LIMITED PRCH	2009 WOODS, WYNONA W
<pre>_ PLP02Z908112 08/19/2009 17:20</pre>	LIMITED PRCH	2009 WOODS, WYNONA W
<pre>_ PLP02Z908126 08/19/2009 17:20</pre>	LIMITED PRCH	2009 WOODS, WYNONA W
_ PLP02Z908214 08/19/2009 17:19	LIMITED PRCH	2009 WOODS, WYNONA W
<pre>_ EBR020466740 08/18/2009 17:34</pre>	BUDGET EPA	2010 LINDSEY, LEONA L
ttt End of Tigh 50 Dogument	(C) Ecund +++	
Francisco DEL DEC DEC DECOMPETIC		
Enter-Pr1Pr2Pr3Pr4Pr5	-PFOPF7PF	0PF9PF10PF11PF12
Hmenu Heip EHelp Recal	RHist Se	I Notes Left Right

0010				y italiie (i	aner of				_
9:	13 Document Ou	t-Box by Name				09/1	L5/09	14:13	П
		LAWRENCE,	LINDA L					CC 02	
S	creen: Na	me:		Documen	t:				
	Actions Fr	om: 08/16/2009	Thru:	09/15/2009	Include	Finished:	Y		
<-	<more< td=""><td></td><td></td><td></td><td></td><td>Panel:</td><td>03</td><td></td><td></td></more<>					Panel:	03		
Sel	Document ID	Submitted F	inished						
_	EWR020467243	08/18/2009	Y						
_	EWR020467271	08/18/2009	Y						
_	PLP02Z908070	08/19/2009	Y						
_	PLP02Z908084	08/19/2009	Y						
_	PLP02Z908095	08/19/2009	Y						
	PLP02Z908104	08/19/2009	Y						
	PLP02Z908112	08/19/2009	Y						
	PLP02Z908126	08/19/2009	Y						
	PLP02Z908214	08/19/2009	Y						
_	EBR020466740	08/18/2009	Y						
	*** End	of List 58 Doc	ument (S) Found ***					
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12									
	Hmenu Help	EHelp R	ecal	RHist Se	1 Notes	s Left Rig	Jht		
_ _ Ente	PLP02Z908214 EBR020466740 *** End er-PF1PF2 Hmenu Help	08/19/2009 08/18/2009 of List 58 Doc -PF3PF4P EHelp R	Y Y ument(S F5PF(ecal) Found *** 5PF7PF RHist Se	8PF9 1 Notes	PF10PF1 5 Left Rig	L1PI ght	712	

Screen 913 - Document Outbox by Name (Panel 3)

Basic Steps

- Advance to Screen 913.
- Type the name of the user whose Outbox is to be displayed, including additional desired criteria.
- Press <ENTER> to display the contents of the selected person's Outbox.
- Type 'X' in the Sel: field and press <ENTER> to view the document cover sheet, or press one of the PF keys at the bottom of the screen. For example, to view details of the document routing history, press PF7.

Explanation Of Outbox Process

<u>PF Keys</u>

Various pop-up screens are available using the PF keys at the bottom on the screen. To access this information, type an 'X' in the Sel: field or position the cursor anywhere on the line of the desired document and press the PF key that indicates the information/action you want. For example, pressing PF9 will display a pop-up window with any notes on the document, while PF7 will display the routing history of the document. **See the Appendix for a more detailed description of the PF Keys and their functions.**

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>

Name:	20 characters Enter the <u>name of the person</u> whose Outbox is to be displayed.
Document:	12 characters/digits Enter the <u>routing document number</u> to be positioned on the first line of the display.

Actions From:	8 digits The default is one month prior to the current date. You may change this date to <u>view documents within a specified date range</u> .		
Thru:	8 digits Displays the current date but you may change it to <u>limit the date range for</u> <u>displaying documents</u> .		
Include Finished:	1 character 'Y' in this field <u>includes documents that have successfully completed the</u> <u>routing process</u> ; 'N' excludes finished documents.		
<u>Screen Information</u> Panel 1			
Sel:	1 character Type an 'X' to <u>select</u> and press <enter> <u>to view the Document Cover Sheet</u>.</enter>		
Document ID:	12 characters/digits Displays the <u>document identification number</u> used in routing and approval which consists of the form (3 characters) + campus code (2 digits) + document number (7 character/digits).		
N:	1 character An asterisk (*) indicates that there are <u>routing notes attached</u> to the document.		
Doc Summary:	40 characters Displays a <u>summary description</u> taken from the original document.		
Status:	14 characters Indicates a document's status in the Routing and Approval system: Blank = In Process CN = Cancelled CO = Completed DR = In Dept routing ER = In Exec routing FN = Final FY = FYA/FRA routing PR = In Proc routing RC = Recalled RJ = Rejected		
Action:	14 characters Shows the <u>last action taken on the document in the routing process</u> .		
Panel 2			
Action Date/Time	: 12 digits		
netter Butty mile.	Identifies the <u>date and time action was taken</u> on the document.		

Screen 913 – Document Outbox by Name (cont'd)

Form Name:	12 characters Displays the <u>type of purchasing document</u> displayed.
FY:	4 digits Indicates the <u>fiscal year</u> of the document.
Submitted by:	21 characters Identifies the name of the <u>person who submitted the document to the Routing</u> and Approval system.
Panel 3	
Submitted:	8 digits Shows the <u>date the document was submitted for approval</u> .
Finished:	1 character Indicates whether the document has <u>finished the routing process</u> .
Additional Functions	
PF KEYS	See the Appendix for explanation of the standard PF Keys.
PF5	Recall
Recal	Recalls the document back to your In-Box.
	This is valid for only the creator of the document and the last person who approved the document.
	A recall reason (note) is required. If the user is the creator, all approvals and other actions are erased; however, routing notes will be retained. If resubmitted to routing, the approvals must start over.
PF7	Routing History
RHist	Used to display the <u>routing history</u> of the document. This is also available on Screen 914. Auto approves are designated by "(A)".
PF8	Select
Sel	After selecting document(s), displays the Purchasing Document Cover Sheet.
PF9	Notes
Notes	Used to display routing notes for the selected document.

The display on Screen 915 lists all of the approval structures that a person is attached to within each campus code. Each office, desk and view is displayed along with the status of the person for that approval structure.

Screen 915 - Approval Profile by Name					
915 Approva	al Profile by	Name		06/06/07 17:5	55
	LEHR,	LEONA L		CC ()2
Screen:	Name:				
Campus Cd	Office	Desk	Status	View	
02	PURCHASING	P-LPAPP		T	
02	PURCHASING	S-LPAPP			
02	PURCHASING	P-REQAPP			
02	PURCHASING	S-REQAPP	S	Only applicable to	
02	PURCHASING	P-LPINFO			
02	PURCHASING	S-LPINFO		Signer or Creator Desk	
02	PURCHASING	P-REQINFO			
02	PURCHASING	S-REQINFO	-		
02	PURCHASING	SIGNER DSK		PURS/WRHS	
02	PURCHASING	CREATE DSK		PURS/WRHS	
02	PURCHASING	SIGNER PLP		PURS/WRHS	
02	PURCHASING	SIGNER PRQ		PURS/WRHS	
02	PURCHASING	SIGNER DSK	S	PURCHASING	
02	PURCHASING	CREATE DSK		PURCHASING	
	More Entrie	s - Press <en< td=""><td>TER> to</td><td>continue</td><td></td></en<>	TER> to	continue	
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12					
Hmenu l	Help EHelp				

Basic Steps

- Advance to Screen 915.
- Type the name of the person whose approval structure you wish to display on the Action Line and press <ENTER> to display all of the approval structures that the person is attached to within your campus code.
- Press <ENTER> to scroll through the listing.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

Action Line

•	Name:
---	-------

20 characters

Identify the <u>person whose approval profile you want displayed</u>. You can do a name search and select by entering an asterisk (*) in the Name: field and pressing <ENTER>.

Screen I	<i>Information</i>	
Cam	pus Cd:	

2 digits Identifies the <u>campus code</u> for the TAMUS Member to which the profile belongs. This is especially useful when a person has approval authority with more than one TAMUS member.

Office:10 charactersDisplays the title of the office in which the person has approval authority.

Desk:	10 characters Identifies the <u>name of the desk</u> where the person has approval authority.
Status:	Help1 characterIndicatehow the document should go to the desk.Blank =ApprovalI=InformationN=Notification
View:	10 characters Displays the <u>name of the view</u> where a person has approval authority on a signer or creator desk. This is only applicable to signer/ creator desks.

Additional Information

PF Keys

See the Appendix for explanations of the standard PF Keys.

The history of a document's routing is available online on Screen 914. Each line is numbered along with a description of the action taken on the document.

Screen 914 - Document Routing History

914 Document Routing History	11/17/10 14:53
Screen. Document, DLD021115405	CC 02
	Position at line:
Ln Description	
1 The following people have seen this document:	
2 Submitted 11/16/10 13:27 WATSON, WANDA W	(979-862-6667)
3 This document is currently in CC 02 office MAIL	
4 on desk APPROVER - Arrival Date: 11/16/2010 13:	: 27
5 Desk workers are:	
6 LING, LONA L (979-845-5555)	
7 MATHEWS, MELINDA M (sub) (979-845-6666)	
8 COOK, CASEY C (sub) (979-862-3333)	
9 ****************************** POTENTIAL ROUTING PATH ******	*****
10 OFFICE: DESK: DEPT/SUB DEPT:	
12 UZ-MAIL SIGNER DSK MAIL	
Place cursor on one of these and press PF6 to view assigned	d users for the routing path
Enter-PF1PF2PF3PF4PF5PF6PF7PF8	-PF9PF10PF11PF12
Hmenu Help Names Bck Fwd	

Basic Steps

- Advance to Screen 914.
- Type a valid document number on the Action Line and press <ENTER> to display the routing history.
- Press <ENTER> to scroll through the display, if necessary.

Explanation of Routing Process

Position the Display

The Position at Line: field can be used to position the screen at a specific line number. This will aid in bringing certain history items into view on the same screen.

The PF7 and PF8 keys allow you to page forward and backwards through the displayed list.

Information Displayed on Screen 914

Actions cancelled by a later "reject" or "recall" of the document are shown with "voided" in the phone number area of the display.

The date and time of the action taken on the specified document have been added to this screen.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>	
Document:	12 characters/digits Identify the <u>document number</u> to be displayed. The document ID consists of Form + Campus Code + Document Number.
Position at Line:	2 digits Indicate the <u>line number to be displayed at the top of the screen</u> .
Screen Information	
Ln:	2 digits Displays sequential <u>line numbers</u> to identify historical actions.
Description:	70 characters/digits Describes the <u>routing history of the document</u> , including actions taken, date and time, person involved and their phone number.
Additional Functions	
PF KEYS	See the Appendix for a detailed description of the standard PF keys.
PF6	Names
Names	Place the cursor on the Office, Desk, or Dept/Sub Dept displayed in the Potential Routing Path area of the screen and press this key to view <u>names of</u>

assigned users.

++	
DESK: SIGNER DSK	
STATUS NAME	
S LING, LONA L MATHIS, MARTIN M	
S HUGHES, HANNA H	
*** END OF LIST - 3 WORKERS FOUND	
PF4 to Quit	
++	

What is a PIP?

A PIP is another name for a **Purchasing Invoice Problem** document created by your Fiscal Department/Business Office in order to tell you about problems they have noticed with your limited purchase order, exempt purchase order, requisition, or purchase order. Typical problems reported using the PIP document include:

- (A) the invoice line item amount is different from the amount on your document --<u>OR</u>--
- (B) the wrong subcode was used on your document.

Why is this PIP in my Inbox?

PIPs are sent from the Fiscal Office back to the creator's Inbox (Screen 910) in order to let you know about a problem that must be resolved before your purchase can be made or paid for. The PIP will contain a description of the problem and suggestions on how to resolve it.

The first thing you should do is to find out what problem the Fiscal Office has discovered. To do this, type an 'X' next to the PIP document in your Inbox. Next, press <ENTER> to open the Routing Document Information window.

910 Document Inbox 06/06/07 17:44		
		CC AM
Screen: Document: Office:	Desk:	
Approvals Only: N	PANEL: 01	MORE>>
	Requested	
Sel Document ID N Doc Summary	Action	Status
$\frac{1}{2} = \frac{1}{2} = \frac{1}$	EVA /Approvo	
PLPAML000305 * OFFICE FURNITURE	Notify	Recalled
PLPSAL000030 LEATHER CHAIR	Notify	Recalled
PIPAMI000001 * PARALLEL 10'	Notify	Recalled
PROSAR000009 * FURNITURE FOR MY OFFICE	Notify	Final
PROSAR000019 * RENTAL OF A XEROX 1090	Notify	Recalled
PROSAR000024 * FURNITURE FOR MY OFFICE	Notify	In Proc Rt
PLPSAL000006 * OFFICE FURNITURE	Notify	Recalled
_ PLPSAL000075 MAHOGANY DESK	Notify	Recalled
_ PRQSAR100001 * COMPUTER MONITOR FOR JULIE WILSON	Notify	Rejected
Fnter-DF1DF2DF3DF5DF5DF5DF8	DF9DF10D	DE11DE12
Hmenu Heln FHeln Digd PHigt Sel	211 I.oft P	ight
imend herp sherp Discu Khist ber	ATT DELC K	trainc

Screen 910 - Document Inbox

creen: **** Invoice Problem (06/06/07 17:44 Cover Sheet ***** CC AB
Action:	
Doc ID: PIPABI700009	Status: FYA/FRA Rt
Requeste	ed Action: FRA/Approve
Doc Summary: TEST	
Released by: 08/06/1997 by: KILEY, KY	LE K
Limited Purch : L520166 PO Doc Creator: KILEY, KYLE K User Ref : Guuuuuul Dept Name : MIS PROJECT TEST	Invoice : INV999MARK Voucher : Vchr Stat:
Press PF6 for more P	PIP information
PF4I	PF5PF6PF7PF9
Exit N	DOC EXPIP RHist Notes

Screen 910 - Document Inbox Pop-Up Window (Cover Sheet)

From here you should press PF6 to view the document summary. The summary will contain the description of the problem and a list of suggestion from the Fiscal Department. To view additional pages from the pop-up window document summary, press PF8. To return to the Routing Document Information window, press PF4.



Screen 910 - Document Inbox Document Summary & PIP Info

Finally, you have to decide what to do about the problem. If you accept the suggestions from the Fiscal Office, you should type **APP** (approve) in the Action: field and press <ENTER>. This will send the PIP to the next person on the normal routing path (i.e. If you are the creator, it will now be sent to your approver; if you are the approver, it will now be sent to the signer, etc.). Once the PIP has finished routing through your department, it will be sent back to the Fiscal Department where they can complete the invoicing process.

If you decide you do not want to accept the suggestions of the Fiscal Department, you should type **REJ** (short for reject) in the Action: field and press <ENTER>. You will then be asked why you want to reject the PIP document and the suggestions of the Fiscal Department. Use the space provided to type a short reason for rejecting the PIP. Press <ENTER> to send the PIP document back to the Fiscal Department.

creen: **** Invoice Probler	06/06/07 17:44 a Cover Sheet ***** CC AB
Action: APP	
Doc ID: PIPABI700009	Status: FYA/FRA Rt
Reques	sted Action: FPA/Ar Approve or
oc Summary: TEST	<u>App</u> rove of
eleased by: 08/06/1997 by: KILEY,	KYLE K <u>rej</u> ect the PIP
Limited Purch : L520166	Invoice : INV999MARK
PO Doc Creator: KILEY, KYLE K	Voucher :
User Ref : 6uuuuul	Vchr Stat:
Dept Name : MIS PROJECT TEST	
Press PF6 for more	PIP information
PF4	PF5PF6PF7PF9
	NDoc ExPIP RHist Notes

Screen 910 - Document Inbox Pop-Up Window (Cover Sheet)

For Your Information

There is another type of PIP that can be sent to your Inbox. These are **<u>FYI</u>** (or For Your Information) documents. These PIPs have been sent to you to tell you about a problem that the Fiscal Office has already corrected.

Once you have reviewed these documents, they may be removed from your Inbox by typing **<u>DIS</u>** to discard the information copy of the document.

Use Screen 292 to view information about a PIP when you know the PIP number.

Screen 292 – PIP Document Browse

292 PIP Do	cument	Browse				10/05/	/07 4:29PM
						FY	2007 CC 02
Screen:	PI	P:					
		_					
PIP		For	Invoice	Rt	Modify	Modify	
Sel Number	Type	Document	Number	Cđ	Date	Time	By User
_ I00001	FYI	L000034	118-0249517-0	FN	09/06/99	08:54	GxxxxxP
_ I00002	FYI	L000078	L000078	FN	09/06/99	09:00	GXXXXXP
_ I00003	FYA	L000152	L000152	FN	09/06/99	09:06	GxxxxxP
1000004	FYI	L000309	L000309	FN	09/06/99	09:43	GxxxxxP
I000006	FYI	L000223	L000223	FN	09/06/99	10:29	GxxxxxP
1000007	FYI	L000488	L000488	FN	09/06/99	10:38	GxxxxxP
1000008	FYI	L000395	120605	FN	09/06/99	11:38	KxxxxxP
1000010	FYI	L000294	L000294	FN	09/06/99	12:56	KxxxxxP
	FYA	L000319	L000319A	FN	09/06/99	13:05	GxxxxxP
1000012	FYA	L000319	L000319	FN	09/06/99	13:06	GxxxxxP
 1000013	FYI	L000359	L000359	FN	09/06/99	13:07	GxxxxxP
1000014	FYI	L000166	L000166	FN	09/06/99	13:34	KXXXXT
_							
		More re	cords - Duran EN	TER to	scroll		
Enter-DE1	-DF2		PE5 PE6 PE	7 28	8PF9	DF10DF1	1PF12
Hmenu	Help	EHelp	View	,	5 IFJ	1110	
Hillenu	nerb	тистр	VIEW				

Basic Steps

- Advance to Screen 292.
- Enter a PIP number in the PIP: field on the Action Line or press <ENTER> to scroll down and search for a specific document or PIP number.
- Place cursor in the Sel: field next to the desired PIP number and press PF6 to view detail about the PIP.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

<u>Action</u>	Line
PIP:	

Help 7 character/digits Enter a valid <u>PIP number</u>.

Screen Information

•	Sel:	1 char	racte	r
		Туре '	'X' aı	nd press PF6 to <u>select a PIP</u> and display the PIP information.
	PIP Number:	7 char	racte	er/digits
		Displa	iys tł	ne <u>PIP number</u> .
	Туре:	3 char	racte	ers
		Shows	s the	type of PIP. Valid values are:
		FYA	=	For your approval
		FYI	=	For your information
		FRA	=	For return approval

Screen 292 – PIP Document Browse (cont'd)

For Document:	7 character/digits Indicates the <u>document number</u> that has a problem or has been corrected.		
Invoice Number:	14 digits Shows the <u>invoice number</u> that is associated with the original document and the PIP document.		
Rt. Cd:	2 charactersIdentifies the routing status.Valid values are:Blank =In Process $CN =$ Cancelled $CO =$ Completed $DR =$ In Dept routing $ER =$ In Exec routing $FN =$ Final $FY =$ FYA/FRA routing $PR =$ In Proc routing $RC =$ Recalled $RJ =$ Rejected		
Modify Date:	6 digits Displays <u>date</u> the <u>document</u> was last <u>modified</u> .		
Modify Time:	4 digits Shows the <u>time</u> the <u>document</u> was last <u>modified</u> .		
By User:	7 characters/digits Identifies the <u>user ID and name</u> of the person performing the action on the document.		
<u>Additional Function</u> PF KEYS	<u>s</u> See the Appendix for a detailed description of the standard PF keys.		
PF6 View	View Shows <u>invoice problem</u> in detail.		
+ Doc: L0000 Created By Code 	78 Invoice Problem I000002 Type: I Inv: L000078 I ': on 09/06/1999 0 more PIPs Page: 1 I ** Code Translation ** I I		

Use Screen 293 to identify PIPs associated with a Purchasing Document. You may not know the PIP number, but you can use the purchasing document number as a starting point. This screen is useful when you need to view all PIPS for a specific document.

				1		-		
2	93 PIP Br	owse by P	urch. I	Document			10/05/	/07 4:28PM
							FY	2007 CC 02
S	creen:	_ Doc:		_				
	Doc	PIP		Invoice	Rt	Modify	Modify	
Sel	Number	Number	Type	Number	Cđ	Date	Time	By User
_	A000541	I003974	FYI	A000541	FN	01/25/00	08:59	WXXXXXP
_	A000552	I003965	FYI	A000552	FN	01/24/00	14:58	GxxxxxP
_	A000558	1003975	FYI	A000558	FN	01/25/00	09:05	WXXXXXP
_	A000563	1003915	FYI	33248	FN	01/21/00	10:36	MxxxxxP
_	A000587	1003980	FYI	IN 308204	FN	01/25/00	12:35	KxxxxT
_	A000587	1004033	FYA	IN 308204	FN	01/27/00	08:50	KxxxxT
_	A000639	1004323	FYI	100426	FN	02/08/00	15:44	AxxxxP
_	A000660	1004355	FYI	92623415	FN	02/09/00	13:11	KxxxxxP
_	A000702	1004396	FYA	92617522	FN	02/11/00	09:36	RxxxxxP
	A000705	1004232	FYI	2019276	FN	02/04/00	10:58	WXXXXXP
_	A000707	1003983	FYI	03428913	FN	01/25/00	13:07	PxxxxxP
_	A000746	1004015	FYA	54108		01/26/00	15:51	KxxxxT
More records ENTER to scroll								
Enter-PF1PF2PF3PF4PF5PF6PF7PF8PF9PF10PF11PF12								
	Hmenu	Help EHe	lp	View				
			-					

Screen 293– PIP Browse By Purch Document

Basic Steps

- Advance to Screen 293.
- Enter a purchasing document number in the Doc field: or press <ENTER> to scroll down and search through the PIPs available.
- Place the cursor in the Sel: field next to the desired PIP and press PF6 to view details.

PIP Types

FYA (for your approval)
 Approve and route forward to a person or desk as a For Your Approval document. This is done when you wish a person to approve a document and they are not in the path for that document. Key in the name of the person or the name of the desk to receive the document for approval in the pop-up window that appears when you enter this action.
 FYI (for your information)
 Send a copy of the document to another person or desk not on the document path. Key in the name of the person or name of the desk to receive the

information or notification copy.

FRA (for return approval)	Send to another person or desk for approval and
	then document returns to the sender. The sender
	will not approve the document until it returns with
	the additional approval.

Field Descriptions (= Required / Help = PF2, ? or * Field Help Available)

<u>Action Line</u>	
Doc:	7 character/digits Enter a valid purchasing <u>document number</u> .
Screen Information Sel:	<u>on</u> 1 character Place the cursor in this field and press PF6 to <u>select a document number</u> and view PIP detail information.
Doc Number:	7 character/digits Displays the <u>document number</u> .
PIP Number:	7 character/digits Displays the <u>PIP number</u> .
Туре:	3 characters Shows the <u>type of PIP</u> . Valid values are: FYA = For your approval FYI = For your information FRA = For return approval
Invoice Number:	: 14 characters/digits Indicates the <u>invoice number</u> that is associated with the document.
Rt Cd:	2 characters Shows the <u>routing status</u> . Valid values are: Blank = In Process CN = Cancelled CO = Completed DR = In Dept routing ER = In Exec routing FN = Final FY = FYA/FRA routing PR = In Proc routing RC = Recalled RJ = Rejected
Modify Date:	6 digits Indicates the <u>date</u> the document was last <u>modified</u> .
Modify Time:	4 digits Shows the <u>time</u> the document was last <u>modified</u> .

Screen 293 – PIP Browse by Purchasing Document (cont'd)

By User:	7 characters/digits
	Identifies the user ID and name of the person performing the action on the
	document.

Additional Functions

PF KEYS See the Appendix for a detailed description of the standard PF keys.

PF6	View
View	Displays the invoice problem in detail.

Doc: A514501	Invoice Problem I509876 Type: A Inv: 2429119
Created By:	on 04/12/2005 0 more PIPs Page: 1
Code	** Code Translation **
OB	This invoice will not post to the account because of "insufficient budget balance available". To pay these expenses on another account submit a written request by someone with signature authority on the new account. Fax to ATTN: OVER BUDGET at 458-4192. DO NOT RECALL THIS DOCUMENT TO CHANGE THE ACCOUNT.
	** Comments ** ACCOUNT 510354
	PF4=Exit

Use Screen 294 to access PIP information when you know the invoice number. This screen is helpful when you need to view invoices that have had PIPS.

Screen	294–	PIP	Browse	By	Invoice
--------	------	-----	--------	----	---------

29	4 PIP Browse	by Invoice		10/05/	/07 4:27PM			
Sc	reen: I	nvoice:		_			F.X	2008 CC 02
	Invoice	Doc	PTP		Rt	Modify	Modify	
Sel	Number	Number	Number	Type	Cd	Date	Time	By User
	L728689	L728689	1705440	FYI	FN	12/20/06	13:33	NXXXXXP
_	001	A205512	I218035	FYI	FN	08/27/02	16:57	WXXXXXP
_	A407329	A407329	I406635	FYA	CN	02/27/04	11:31	WXXXXXP
_	A617624	A617624	I609438	FYI	FN	04/12/06	11:17	BXXXXXP
_	A617624	A617624	1609492	FYA	FN	04/13/06	11:06	BXXXXXP
_	A617640	A617640	I609497	FYI	FN	04/13/06	11:50	GxxxxxP
_	A633476	A633476	1611677	FYA	FN	06/01/06	12:30	DxxxxxP
_	A633476	A633476	I611678	FYA	FN	06/01/06	12:32	DxxxxxP
_	A633532	A633532	I612480	FYA	FN	06/19/06	10:43	JXXXXXP
_	A710199	A710199	I709470	FYI	FN	03/23/07	09:48	CxxxxxP
_	C06-117118	L709327	1710934	FYA	FN	04/18/07	17:34	DxxxxxP
_	D742662	L509715	1502683	FYI	FN	10/20/04	14:16	GxxxxxP
		More rec	ords - Pr	ess EN	ren to	scroll		
Ente	er-PF1PF2	-PF3PF4	-PF5PF	6PF	7PE	8PF9	PF10PF1	11PF12
	Hmenu Help	EHelp	Vi	ew				

Basic Steps

Action Line

- Advance to Screen 294.
- Enter an invoice number in the Invoice: field or press <ENTER> to scroll down and search through the invoices displayed.
- Place cursor in the Sel: field by an invoice number and press PF6 to view detail.

Field Descriptions (Required / Help = PF2, ? or * Field Help Available)

	Invoice:	Help 14 characters/digits
		Enter a valid <u>invoice number</u> .
<u>Sci</u>	<u>een Information</u>	
•	Sel:	1 character
		Type 'X' and press PF6 to <u>select an invoice number</u> and view detail about the selected PIP.
	Invoice Number:	14 digits/characters
		Shows invoice number associated with the PIP.
	Doc Number:	7 character/digits
		Displays the document number.
	PIP Number:	7 character/digits
		Displays the <u>PIP number</u> .

Screen 294 – PIP Browse by Invoice (cont'd)

Туре:	3 characters									
	Shows the type of PIP. Valid values are:									
	FYA = For your approval									
	FYI = For your information									
	FRA = For return approval									
Rt Cd:	2 characters									
	Shows the <u>routing status</u> . Valid values are:									
	Blank = In Process									
	CN = Cancelled									
	CO = Completed									
	DR = In Dept routing									
	ER = In Exec routing									
	FN = Final									
	FY = FYA/FRA routing									
	PR = In Proc routing									
	RC = Recalled									
	RJ = Rejected									
Modify Date:	6 digits									
	Displays <u>date</u> document was last <u>modified</u> .									
Modify Time:	4 digits									
······································	Shows the <u>time</u> the document was last <u>modified</u> .									
By User:	7 characters/digits									
	Identifies the <u>user ID and name</u> who took action.									

Additional Functions

PF KEYS See the Appendix for a detailed description of the standard PF keys.

PF6	View
View	Displays the invoice problem in detail.

Doc: A514461	Invoice Problem I509508 Type: I Inv: 030105
Created By:	on 04/04/2005 0 more PIPs Page: 1
Code	** Code Translation **
T#	Please make sure the document number is used as the invoice number when processing payments/reimbursements to individuals. DO NOT use any invoice numbers from receipts or invoices attached in this situation. For example, screen 341 should have Doc: L543210 and Inv: L543210. This must be entered so that our imaging system can automatically update each night without rejecting documents. If you have any questions, contact IR Auditor at 845-8888 or email informed to the server and the
	this time.
	** Comments **
	I WILL CORRECT THIS TO PROCESS, BUT THE DOC NUMBER SHOULD
	ALWAYS BE USED AS THE INVOICE NUMBER ON INDIVIDUAL REIMBURSE MENTS. THANKS. JANICE JORDAN 455-5555

Section XIV Appendix

Instructions

Listed below are general instructions that will make your job easier as you use FAMIS to input or view document information. Please become familiar with the information in this reference as it can make your navigation in FAMIS more efficient.

3270 Emulation Keys

Special keys and key combinations must be used when working with FAMIS. These keys are known as 3270 emulation keys and may be defined differently by each 3270 terminal or PC emulation software that you are using. Contact your computer support person if you do not know how to identify the following keys on your computer.

PF Keys

When a key is listed as **PFn**, PF represents <u>Program Function</u>. Many PCs use the function keys labeled **Fn** for these PF keys. Others have special combinations of keys to represent the PF keys, for example, on a Memorex emulation, a combination of the ALT key and the number 1 will represent the PF1 key.

At the bottom of the FAMIS screens, there are PF keys listed that can assist in the use of the screen. For example, on Screen 104, Voucher Create, the bottom of the screen shows the PF7 with the word 'Bkwd' under it. This means that by pressing the PF7 key, the screen listing will scroll backwards.

TAB and BACKTAB Keys

Use the **TAB** and **BACKTAB** keys on a 3270 terminal to move from field to field. This will position the cursor at the start of each field. Most PCs have a key labeled TAB, while the BACKTAB is a combination of the SHIFT/TAB keys.

Using the arrow keys, instead of the TAB keys, to move around the screen may lock the computer keyboard. Use the RESET key, then the TAB key, to position the cursor and unlock the keyboard.

CLEAR Key

The **CLEAR** key on many PC keyboards is the **PAUSE** key. This key is often used to clear, or refresh, the screen before typing.

RESET Key

After pressing <ENTER> to process data information, note the status bar at the bottom of the screen. When the system is processing information, the symbol "**X** ()" or \mathbb{Z} will appear. You cannot enter additional information until the system is finished processing. If <u>any</u> other symbols appear, press your **RESET** key -- often the **ESCAPE** key on a PC.

ERASE END OF FIELD Key

To erase all the information in a field with one stroke, the **ERASE EOF** key on a 3270 keyboard is helpful. For example, a vendor name is held in context when moving from screen to screen. To change to a different vendor, use this key and the current vendor name in the Action Line will be removed. Now the new vendor name can be input. On most PCs, the correct key to use is the **END** key on the numeric keypad.

HOME Key

From anywhere on the screen, the most efficient way to take the cursor back to the Screen: field on the Action Line is by pressing certain keys. For the 3270 terminals, the correct combination is the **ALT/RULE** keys. On most PCs, the **HOME** key on the numeric keypad will work.

Protected Area

The **Protected Area** is the area of the screen that will not allow the user to enter information. Typing information in the protected area may freeze the screen. Use your **reset** key and then **tab** key to release your system when it freezes.

Action Line/Context

The *Action Line* is usually the first line of information on each screen. The Screen: field is used to navigate from screen to screen by entering the number of the screen desired. Fields such as screen, vendor, voucher number, account, etc. are often found on the Action Line.

Data that is entered on the Action Line will be carried in 'context' from screen to screen until changed. For example, the GL account number 032365 is entered on the Action Line of the screen below. That account will be carried in 'context' until the user keys a different account in the field.

The **<ENTER**> key <u>must</u> be pressed after entering **Action Line** data. If a user does not follow this step, all information entered on the screen may be lost and must be re-entered. After pressing **<ENTER**>, a message will be given at the top of the screen asking for modifications or providing further processing instructions.

F0002 Record has been successfully added 002 GL 6 Digit			03/03/94 14:56 FY 1994 CC AA
Screen: Account: 032365	NAVSO,	INC.	FI IJJI CC AA
Account Title: NAVSO, INC			

Message Line

The line above the Action Line is used to display messages to the user. These messages may be error messages or processing messages, such as the one below.



Scrolling Through Data

Pressing the **<ENTER>** key will scroll through information listed on a screen. On some screens, there are PF keys to use to scroll forward, backward, left and right. These PF keys are displayed at the bottom on the screens with that function.

Help

HELP functions are available for many screen fields in FAMIS. Placing a "?" in the blank beside the desired field and hitting <ENTER> will access a pop-up window with specified field information. Another way is to place your cursor in the desired field and press the F2 key.

To get out of the HELP function, either select a value and press <ENTER> or hit the **PF4** key. The distinction on which key to use will normally be designated in the pop-up window (EX: **PF4** = Exit).

Escaping from a Pop-Up Window

When in a pop-up window, pressing **PF4** will usually take you back to the original screen. There are a few screens when pressing <ENTER> will take you back to the original screen.

Field Help Using the F2 Program Function Key

On selected fields, additional information can be displayed using the F2 program function key. This HELP information is accessed by moving the cursor to the field in question and pressing the F2 Key.

Screen 002 - GL 6 Digit

F0002 Record has been successfully added	
002 GL 6 Digit	03/03/94 14:56
0	FY 1994 CC AA
Screen: Account: 032365 NAVSO,	INC.
Account Title: NAVSO, INC	
Resp Person: 9uuuuuuu9 DOE, JANE	Old Acct:
Year-end Process: F Reclassify: _ Report	ting Group:
Fund Group: FG Sub Fund Group: DF Sub-Su	ub: GP
Default Bank: 00001 Override: Y SL Mar	oped Count:
Alternate Banks: 00002	Security:

The first help screen describes the field; pressing <ENTER> will display the valid values for the field.

DESCRIPTION:	DESIGNATES	DEPARTMENTS	WITHIN SC	HOOLS OR U	NITS FOR
WHICH FISCAL	L REPORTS WI	LL BE NECES	SARY, I.E.	CHEMISTRY	DEPARTMENT,
ADMINISTRAT:	ION AND COUN	ISELOR EDUCA	TION.		

DESC	+-															+	
	3		* * *	D	ΙC	ті	0	N	AI	R	Y - Н	ΕL	Р	* * *		3	
	3	VALUES									MEANIN	G				3	•
	3															3	1
	3	ACCN									ACADEM	IC (COM	PUTING	G CENTER	3	1
	3	ACCS									ACADEM	IC (COM	PUTING	SERVICES	3	1
	3	ACCT									ACCOUN	TIN	G			3	1
	3	ADEX									ADULT	& E2	XTE	NSION	EDUCATION	3	1
	3	ADLL									ADULT :	LIT	ERA	CY & I	LEARNING CI	EN 3	1
	3															3	1
	3	Lookup Va	lue /	. м	enu											3	
	3	Rule : I	ASYS-D	EPT							Defau	lt	val	ue is:	:	3	1
	3	View : I	AFRS-G	ENE	RAL	-SUE	SI	DIA	RY							3	•
	3	Field: F	G-FS-D	EPT												3	•

Question Mark (?) Help

FAMIS also provides information about selected fields through the Question Mark (?) Help facility. This HELP information may be accessed by typing a question mark (?) in the field in question and pressing the <ENTER> key.

A pop-up window is displayed with the valid values for the field. By placing an 'X' next to the desired value, that value is passed to the main screen. This is the Passback feature.

Screen 002 - GL 6 Digit

F0002 Record has been successfully added	
002 GL 6 Digit	03/03/94 14:56
0	FY 1994 CC AA
Screen: Account: 032365	NAVSO, INC.
Account Title: NAVSO, INC	
Resp Person: 9uuuuuuu9 DOE, JANE	Old Acct:
Year-end Process: F Reclassify: _	Reporting Group:
Fund Group: FG Sub Fund Group: DF	Sub-Sub: GP
Default Bank: 00001 Override: Y	SL Mapped Count:
Alternate Banks: 00002	Security:
Dept S-Dept Exec Div	Coll Mail Cd Stmt
Primary: ELEN_ EPI FA AD	EN C3128 Y
Secondary:	
Long Title: NAVSO, INC. ENDOWMENT	
Account Letter, Y Setup Date: 02/28/9	4
Account Hetter. 1 Setup Date: 02/20/5	1
Enter-PF1PF2PF3PF4PF5PF6P	F7PF8PF9PF10PF11PF12
Hmenu Help WErrs Thelp Copy Paste E	rrs Deflt Exit

Routing and Approval Screens List

		PAGE
M90	Routing and Approval Menu Contains a list of screens used to access routing and approval documents.	III-18
M91	Electronic Office Management Menu Contains a list of the screens used to create/modify desks and paths for office management.	IV-3
292	PIP Document Browse Used to view and select PIP documents in PIP document number order.	XIII-32
293	PIP Browse by Purch. Document Used to view and select all PIPs for a document.	XIII-34
294	PIP Browse by Invoice Used to view and select invoices by invoice number for any documents that have had PIPs.	XIII-37
850	FRS Person Information Add or maintain information for budgeted personnel.	V-21
860	Department Table Maintenance Used in FRS and FFX to maintain a table of valid departments for each TAMUS campus.	V-25
910	Document Inbox Provides a screen to access documents ready for user's action.	XIII-4
911	Document Inbox by Name Used to access the documents in another user's Inbox.	XIII-12
912	Document Outbox Provides information on documents that the user has previously taken action on.	XIII-17
913	Document Outbox by Name Used to access the documents for a particular person. Element Security #10 allows help desk people to view all data.	XIII-21
914	Document Routing History Provides information on the actions that have been taken on a document.	XIII-27
915	Approval Profile by Name Provides information about the approval authority of a particular person.	V-4
918	Documents by Department Used to view information on documents for a department.	V-18
920	Dept View Create/Modify Used to create or modify a department view.	VIII-4
921	Dept Paths Create/Modify Used to create or modify department approval paths.	VIII-15
922	Approver Desk Create/ Modify Used to create or modify approval desks.	VIII-9
923	Signer Desk Modify Used to modify signer desks.	VIII-12

Appendix – Routing and Approval Screens List (cont'd)

024		AGE
924	Used to modify creator desks.	111-7
925	Executive Paths Create/Modify	IX-5
	Used to create or modify executive paths.	
926	Processing Paths Create/ Modify	.X-4
	Used to create or modify processing department approval paths.	
928	Dept View Delete	XI-5
	Used to delete a departmental view.	
930	Desk Copy	XII-7
	Used to copy a desk to a new desk.	
935	Dept/SDept by Office	.V-8
	Provides a list of the departments and subdepartments within an office.	
936	Views by Office	V-10
	Provides a list of the views that belong to an office.	
937	Desks by Office	V-12
	Provides a list of the desks within an office.	
938	Office/Desk Workload	V-14
	Provides a list of documents currently routed to desk(s) in the office.	
940	Office Create/Modify	VII-4
	Used to create or modify an electronic office.	
941	Unit to Office Assignment	VII-7
	Used to attach departments and subdepartments to an office.	
943	Security Signer Desk Modify	XII-5
	Used by a security officer to modify signer desks.	
944	Office Delete	XI-7
	Used to delete an electronic office.	
945	Office Browse	V-6
	Provides a list of the electronic offices.	
950	Electronic Documents ProfilesX	II-10
	Used to create, delete or modify the valid document types for the routing and approval system.	

Valid Field Values

Many of the fields that have multiple valid values are repeated throughout this manual. By combining the information for these fields in one central place, it will help condense the size of this manual, and provide a single reference area for this type of information.

FIELD Name	<u>Type 8</u>	Type & Valid Values			
Inbox Action:	Action you wish to take on the document. Note if you don't have approval authority, you will not see this field displayed. Valid values				
	are:	_	Approve the desurport		
	АРР FYA	=	Approve the document. <u>Approve</u> and route to another for approval. This is done when you wish a person to approve a document and they are not in the path for that document. Key in the name of the person or the name of the desk to receive the document for approval in the pop-up window that appears when you enter this action.		
	FRA	=	Route for Approval and Return. This document will be returned to you for approval before it goes to any other approvers.		
	FYI	=	Send a copy of the document to another person or desk not on the document path. Key in the name of the person or name of the desk to receive the <u>information</u> or notification copy.		
	HLD	=	Mark the document as HELD by me to take action		
	REJ	=	Reject this document back to the creator for revision		
	DIS	=	Discard information/notification copy from my INBOX		
	FYP	=	Forward for processing (Processing Dept ONLY)		
	SUB	=	Submit the document for approval		
Form:	Туре с	of do	cument:		
	DBR	=	Dept Budget Request		
	EBR	=	Employee Budget Request		
	EGR	=	Employee Grad Request		
	EWR	=	Employee Wage Request		
	PBD	=	Bid		
	PEP	=	Exempt Purchase		
	PIP	=	Invoice Problem		
	PLP	=	Limited Purchase		
	PPO	=	Purchase Order		
	PRQ	=	Requisition		

FIELD Name	<u>Type & Valid V</u>	/alue	<u>25</u>
Requested Action:	Identifies the a	ictio	n needed for the document. Valid values are:
	FYA/Approve	=	For Your Approval Routing
	FRA/Approve	=	For Return Approval Routing
	Revise	=	Revise and route
	Approve	=	Approve and route
	Notify	=	Notification copy
	FYI	=	For Your Information only
	Sign required	=	signer desk approval required
Status:	Shows the doc	ume	ent progress
	Cancelled	=	Document cancelled
	Completed	=	Document completed
	In Dept Rt	=	In department routing (not FYA/FRA)
	FYA/FRA Rt	=	<u>For Your Approval routing</u> (in department routing
			but not through path
	Rejected	=	Document rejected
	Recalled	=	Document recalled
	In Proc Rt	=	In Processing routing
	In Exec Rt	=	In Executive routing
	Final	=	Finished routing
Туре:	Identifies the t	ype	of routing. Valid values include:
	APP	=	Approve the document.
	FYA	=	Approve and route to another for approval. This is
			done when you wish a person to approve a
			document and they are not in the path for that
			document. Key in the name of the person or the
			name of the desk to receive the document for
			approval in the pop-up window that appears when
			you enter this action.
	FRA	=	Route for Approval and Return. This document will
			be returned to you for approval before it goes to
			any other approvers.
	FYI	=	Send a copy of the document to another person or
			desk not on the document path. Key in the name of
			the person or name of the desk to receive the
			information or notification copy.
	HLD	=	Mark the document as <u>HELD</u> by me to take action
	REJ	=	<u>Reject</u> this document back to the creator for
			revision
	DIS	=	Discard information/notification copy from my
			INBOX
	FYP	=	Forward for processing (Processing Dept ONLY)
	SUB	=	Submit the document for approval

Standard PF Keys

PF Keys are used in Routing & Approval to access additional information. Where ever possible the same assignment has been given to the same PF key, such as PF9 always being the key used for NOTES. Occasionally this has not been possible and a different assignment has been made.

The following list is to help you identify the functionality behind the PF keys that you will see on the many screens in Routing & Approvals.

Many screens have extended information windows assigned to various function keys that are designated at the bottom of each screen and pop-up window. Placing the cursor (using the cursor arrow keys) on a particular line and pressing the extended information function key will display the pop-up window information for the document or item on that line.

Exiting a pop-up window is done by pressing <PF4> to return to the previous window or inquiry screen. If multiple windows have been opened pressing <PF3> will return you directly to the screen where you started.

From within many of the pop-up windows an additional set of extended function keys may appear to offer further inquiry on the document or item.

Extended Function Keys

Audit

Produces document audit information inquiry.



Left

Some window are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the left.

NamesDisplays the names of the desk assignees in a pop-up window when
the cursor is in the "current" or "previous" range. 'S' in the status
field indicates that the assignee is a substitute.

937 Desk	s by Office				11	/17/03	16:05 CC 02
Screen:	Office: PUR	CHASING	Desk:				
S Des	+					+	F
_ ADMIN	DESK: ADMIN						
_ ADMIN							
_ ADMIN	UIN	STATUS	NAME				
_ ADMIN							
_ ADMIN	4uuuuuuu6		JANSON, JANIC	EJ			
_ ADMIN	4uuuuuuu5	S	GOLDMAN, GINN	Y G			
_ ADMIN	4uuuuuuu4	S	LINDSEY, LAUR	AL			
_ ADMIN							
_ ADMIN							
_ ADMIN							
_ APPRO							
_ CENTR	*** END OF	LIST - 3	WORKERS FOUND				
_ COMP-					PF4 to	Quit	
_ COMP-							
·	+						F Contraction of the second
Enter-PF1-	PF2PF3PF	4PF5-	PF6PF7P	F8PF9	-PF10P	F11PH	712
Hmen	u Help EHelp		Names				

NDoc:

Next Document

Exit current Cover Sheet pop-up window and displays cover sheet for the **Next Document** selected. If none exist, will return to the Inbox screen.

Notes:Displays any notes attached to the document header. Use the
Position at Line: field to start the text at a particular line. The Page
(F/B/E): field scrolls Forward, and Backwards through the text, or
End to exit the window. PF8 can be used to view the notes on the
next item, while PF7 will display the notes on the previous item.

R500104 0	.0 Position at line:
Line	******** Note Text *******

Right

Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the right.

Appendix – Valid Field Values (cont'd)



******************************	Ocument Summary ************************************
R500173	Number of Desc Lines: 5 Page: 1_ Of 2
VENDOR:	++
	DOC: R500173
	USER REF: 455019-5001
	++
INVOICE TO:	SHIP TO:
FISCAL DEPT.	CHEMISTRY DEPARTMENT
COKE BLDG. RM. 104	COLLEGE STATION TX 77843
COLLEGE STATION TX 77843	
	DE4-Errit DE7-Dal DE8-Ermd

Track

Displays a document tracking window identifying all types of action that have gone against this document. From within this window you may track any of the related documents by placing the cursor on any of the windows lines and press <PF12> again.

+ +	Screen.	03/22/95 11.58
	bereen.	
		**** Routing Document Information **** CC AA
+-	ACtio -	*
1 1		0007 End of valid data reached
	Doc ID	R R500174 Document Tracking
i i	Doc Summ	
i i	Released	Class Document Item Action Date Time
i i		· · · · · · ·
i i		TO CREATE 11/29/94 10:41
1 1	Pequiait	TO CLOSED 11/29/94 10:46
1 1	Contact	IC CLOBED II/2//94 IO:40
1 1	Dent Nem	From
!!	Dept Nam	From
	Doc Tota	From
		From
1 1		From
i i		PF3= Back to Cvr PF4=Exit PF12=Track
i i	-	+
1 - L		Exit NDog Summ Audit Aggts Notes Headr Items Track
- I		Exit Moot build Addit Acts Notes headi items ilaci

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