

**WEB-BASED  
DOCUMENT ROUTING AND APPROVALS  
(ROUTING)**

**Version 1.0  
February 2004**



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# Web-Based Document Routing and Approvals (Routing)

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# Web-Based Document Routing and Approvals (Routing)

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## INTRODUCTION

The web-based Routing and Approvals system has been created to provide FAMIS users with access to this module via the internet.

Your access to information within this system will be determined by your FAMIS security officer. Depending on your access rights, you may view, modify, and create documents within the Routing and Approvals system.

**NOTE:** For more detailed instruction in using the FAMIS Routing and Approvals module, please see our FAMIS Routing and Approvals User's Manual. You may access this manual from our web site (<http://sago.tamu.edu/famis>).

## -- LOGON --

To logon to the Routing and Approvals system, enter your FAMIS ID and password and press <ENTER>.

The screenshot shows the CANOPY web interface. At the top, it says "SAGO Business Computing Services" above the "CANOPY" logo, with "WEB ENABLED BPP/FAMIS" below it. The main content area is a "Logon" form with a blue header. The form contains the text "Please enter your FAMIS ID and password." followed by two input fields: "User ID :" and "Password :". Below the password field is a "Submit" button. At the bottom of the form area, there is a link for "Privacy Statement" and a copyright notice: "© 2003 The Texas A&M University System".

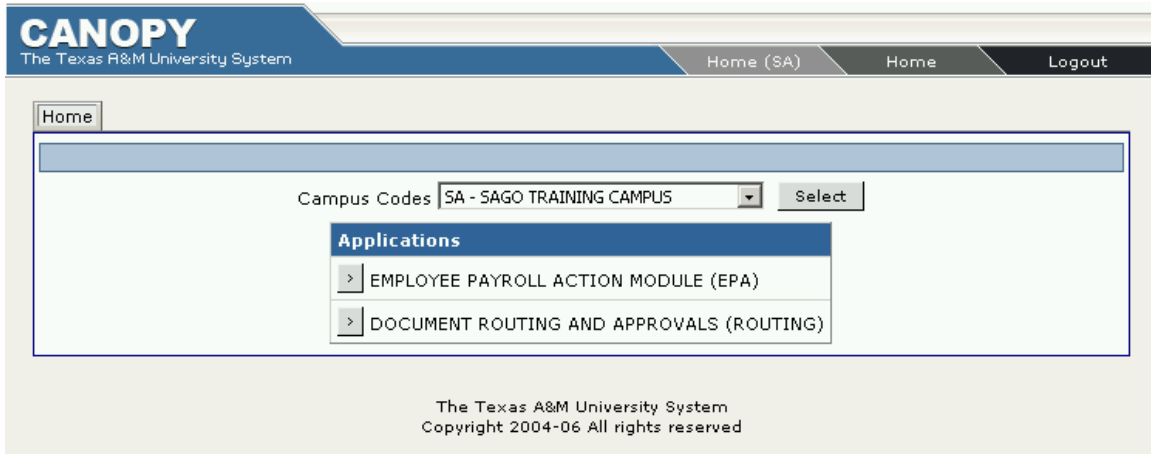
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## Web-Based Document Routing and Approvals (Routing)

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### -- HOME PAGE --

After you logon, note the tab choices at the top of the screen. The “Home” tab takes you back to the beginning screen, and the “Logout” tab allows you to quit your session and logs you out of the web-based system.



**NOTE: Be sure to ALWAYS logout when you are finished, and close the browser window.**

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# Web-Based Document Routing and Approvals (Routing)

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## -- MENU TABS --



### **Routing (campus code)**

Displays documents in your InBox.

### **Home**

Click on this to return to the main menu.


### **Logout**


Click on this to log out of the online Routing and Approvals module when you are finished. ALWAYS log out when you leave your desk or when you have completed using this module, and close the browser window.


## -- COMMON SCREEN FEATURES --

There are some common elements on each page of this module:

If an item is displayed as an underlined link or shows the underline when you place your cursor on it, you may click on the document number or item instead of clicking on the button beside it.

 Click on this button to expand and show more detail.

 Click on this button to collapse and hide detail.


 This symbol indicates that the items in the column can be sorted by:

 Ascending

 Descending

 Expand the column to show additional information.

 Collapse to hide the expanded detailed information.



 Collapse or Open all sections displayed on the screen.

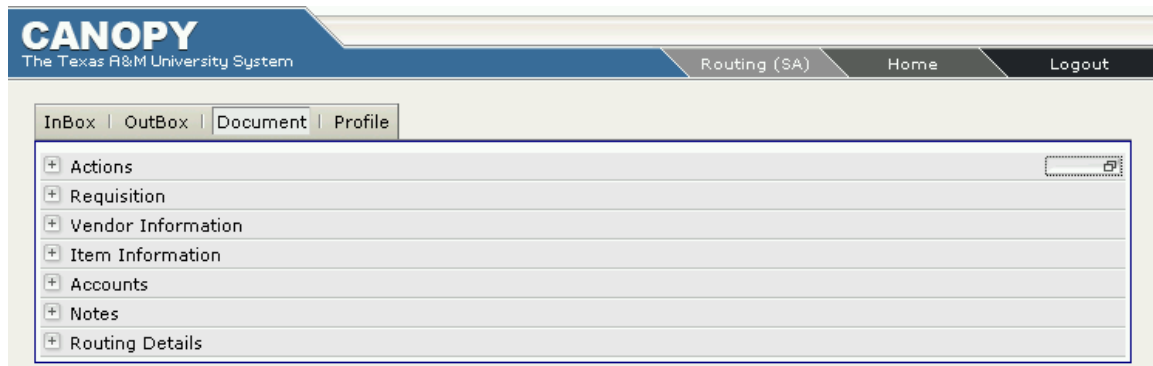
---









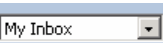

## Web-Based Document Routing and Approvals (Routing)

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### -- COMMON SCREEN FEATURES -- (CONTINUED)

If the Document page is shown with all items collapsed, you may either click on each individual  button, or click on the  button to open / expand all sections.



-  Search/Select
-  Cancel Selection
-  Approve item
-  Discard item
-  Go to the beginning of the list displayed
-  Go to the end of the list displayed
-  Page forward
-  Page backward
-  Drop down arrow indicates a list of choices
-  This symbol means that the document has notes attached



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# Web-Based Document Routing and Approvals (Routing)

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-- MAIN MENU --

Home

Campus Codes SA - SAGO TRAINING CAMPUS Select

**Applications**

- > EMPLOYEE PAYROLL ACTION MODULE (EPA)
- > DOCUMENT ROUTING AND APPROVALS (ROUTING)

The Texas A&M University System  
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- Select your campus code from the drop down menu. If you have access to only one campus, there won't be a drop-down list.
- From the Applications box, click on the arrow button next to the Document Routing and Approvals module, or on the link itself, to advance to the Routing module.

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# Web-Based Document Routing and Approvals (Routing)

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## INBOX

The InBox displays the documents that have been recalled or routed to you for notification, approval, or for correcting a problem.

This is the look of your InBox. This lists all the documents that have come to your InBox for some type of action.

## -- PANELS --

The first page displays the most important information about the documents.

### Panel 1

| Quick Actions | Doc Number                   | Requested Action | Current Status | Arrival Date          | Notes | Summary                                 | Expand >> |
|---------------|------------------------------|------------------|----------------|-----------------------|-------|---|-----------|
| A             | <a href="#">PRQSAR000013</a> | FYA/Approve      | FYA/FRA Rt     | 3/27/2000 11:49:00 AM |       | COPIER RENTAL FOR 4-1-00 THROUGH 8-31-0 |           |
| D             | <a href="#">PRQSAR000019</a> | Notify           | Recalled       | 3/28/2000 4:55:00 PM  |       | RENTAL OF A XEROX 1090                  |           |
| D             | <a href="#">PLPSAL000075</a> | Notify           | Recalled       | 3/28/2000 4:57:00 PM  |       | MAHOGANY DESK                           |           |
| D             | <a href="#">PLPSAL000006</a> | Notify           | Recalled       | 3/29/2000 4:33:00 PM  |       | OFFICE FURNITURE                        |           |
| D             | <a href="#">PRQSAR000009</a> | Notify           | Final          | 4/18/2000 11:18:00 AM |       | FURNITURE FOR MY OFFICE                 |           |
| D             | <a href="#">PRQSAR000024</a> | Notify           | Final          | 4/3/2003 10:21:00 AM  |       | FURNITURE FOR MY OFFICE                 |           |
| D             | <a href="#">PRQSAR100001</a> | Notify           | Rejected       | 4/3/2003 10:22:00 AM  |       | COMPUTER MONITOR FOR JOY COOPER         |           |
| D             | <a href="#">PPOAMPS50043</a> | Notify           | Final          | 8/21/2003 5:21:00 PM  |       | TEST FOR MULTI-CAMPUS                   |           |

Click on the “Expand” button in the “Summary” column, to view additional columns of information on Panel 2.

# Web-Based Document Routing and Approvals (Routing)

## Panel 2

Home
Logout

| <input type="checkbox"/> Collapse << | Doc. FY | Creator            | Created Date <input type="checkbox"/> | Current Unit  | Current Office | Current Desk <input type="checkbox"/> |
|--------------------------------------|---------|--------------------|---------------------------------------|---------------|----------------|---------------------------------------|
| TAL FOR 4-1-00 THROUGH 8-31-0        | 2000    | STRZELEC, FREDA F  | 03/27/2000                            | SA-INRE-FAMIS |                | INDIVIDUAL                            |
| XEROX 1090                           | 2000    | COOPER, JOYCELYN A | 03/27/2000                            |               |                |                                       |
| DESK                                 | 2000    | COOPER, JOYCELYN A | 03/28/2000                            |               |                |                                       |
| FUTURE                               | 2000    | COOPER, JOYCELYN A | 03/28/2000                            |               |                |                                       |
| FOR MY OFFICE                        | 2000    | COOPER, JOYCELYN A | 03/27/2000                            |               |                |                                       |
| FOR MY OFFICE                        | 2000    | COOPER, JOYCELYN A | 03/27/2000                            |               |                |                                       |
| MONITOR FOR JOY COOPER               | 2001    | COOPER, JOYCELYN A | 11/21/2000                            |               |                |                                       |
| MULTI-CAMPUS                         | 1995    | COOPER, JOYCELYN A | 08/21/2003                            |               |                |                                       |

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# Web-Based Document Routing and Approvals (Routing)

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## -- FILTERS --

Filters help you to look at only certain types of documents.

Click the “+” symbol to the left of “Filters” to expand the section. You may filter the displayed items to show a specific document by:

- typing the document number in the field provided
- click on the “Approval Only” box to only show documents that need to be approved

Click on the “Apply Filter” button to apply the desired filters.

| Quick Actions | Doc Number                   | Requested Action | Current Status | Arrival Date          | Notes | Summary                                 | Collapse << |
|---------------|------------------------------|------------------|----------------|-----------------------|-------|---|-------------|
| A             | <a href="#">PRQSAR000013</a> | FYA/Approve      | FYA/FRA Rt     | 3/27/2000 11:49:00 AM |       | COPIER RENTAL FOR 4-1-00 THROUGH 8-31-0 |             |
| D             | <a href="#">PLPSAL000030</a> | Notify           | Recalled       | 3/28/2000 4:43:00 PM  |       | LEATHER CHAIR                           |             |
| D             | <a href="#">PRQSAR000019</a> | Notify           | Recalled       | 3/28/2000 4:55:00 PM  |       | RENTAL OF A XEROX 1090                  |             |
| D             | <a href="#">PLPSAL000075</a> | Notify           | Recalled       | 3/28/2000 4:57:00 PM  |       | MAHOGANY DESK                           |             |
| D             | <a href="#">PLPSAL000006</a> | Notify           | Recalled       | 3/29/2000 4:33:00 PM  |       | OFFICE FURNITURE                        |             |
| D             | <a href="#">PRQSAR000009</a> | Notify           | Final          | 4/18/2000 11:18:00 AM |       | FURNITURE FOR MY OFFICE                 |             |
| D             | <a href="#">PROSAR000024</a> | Notify           | Final          | 4/3/2003 10:21:00 AM  |       | FURNITURE FOR MY OFFICE                 |             |

## -- SUBSTITUTE --

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

In the field to the right of “Substitute For:” you may select “My Inbox” or “My Creator Desks” to alter the items displayed on this page.

The “S” button will only be visible if you have access to view someone else’s InBox. The drop down list will let you choose the person that you are substituting for.

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## Web-Based Document Routing and Approvals (Routing)

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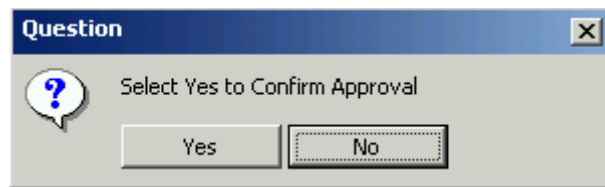
### -- QUICK ACTIONS --

There are two buttons under the “Quick Actions” column that allow you to:

- A Approve
- D Discard

#### **\*\*Approve\*\***

If you choose to approve a document, you will see an alert box that asks you to verify that you are approving this document.



If you are not authorized for approving a document you will see the following message, or if you are a substitute for a person on one desk but not on all their desks.

**F8265 You are not authorized for the current desk of this doc**

#### **\*\*Discard\*\***

If you click on “D” for discard, the document is discarded immediately. You will then see the following message:

**F2218 Document has been discarded and removed from your In-Box**

# Web-Based Document Routing and Approvals (Routing)

## OUTBOX

The OutBox contains all 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.

## -- PANELS --

Click on the "Expand" button in the "Summary" column, to view additional columns of information on Panel 2.

### Panel 1

The screenshot shows the CANOPY web application interface. At the top, there is a navigation bar with "CANOPY The Texas A&M University System" on the left and "Routing (SA)", "Home", and "Logout" on the right. Below the navigation bar, there are tabs for "InBox", "OutBox", "Document", and "Profile". The main content area is divided into two sections: "Filters:" and "Details:".

**Filters:**

- Start Date: 12/21/2003
- End Date: 01/21/2004
- Include Finished:
- Document:
- Substitute For: My Outbox
- Apply Filter button
- Found 1 Documents.

**Details:**

| Doc Number                   | Current Status | Action Taken | Action Date          | Notes | Summary       | Expand >> |
|------------------------------|----------------|--------------|----------------------|-------|---------------|-----------|
| <a href="#">PLPSAL000030</a> | Cancelled      | Discard/Cncl | 1/13/2004 5:04:00 PM |       | LEATHER CHAIR |           |

Page 1 of 1

### Panel 2

The screenshot shows the CANOPY web application interface with a detailed document list. At the top, there is a navigation bar with "Routing (SA)", "Home", and "Logout". Below the navigation bar, there is a table with columns for "Action Date", "Notes", "Summary", "Form", "FY", "Creator", "Created Dt", and "Finished".

| Action Date          | Notes | Summary       | Form         | FY   | Creator            | Created Dt | Finished |
|----------------------|-------|---------------|--------------|------|--------------------|------------|----------|
| 1/13/2004 5:04:00 PM |       | LEATHER CHAIR | LIMITED PURC | 2000 | COOPER, JOYCELYN A | 03/28/2000 | N        |

Click on the "Collapse" button in the "Summary" column to return to the normal one page display.

# Web-Based Document Routing and Approvals (Routing)

## DOCUMENT

### -- DOCUMENT DETAIL --

To "VIEW" a document, click on the document number (link) from the InBox. (Note: the "Document" tab is now indented.)

You may now scroll down through the details of the document and its history.

|       |  |        |  |          |  |         |
|-------|--|--------|--|----------|--|---------|
| InBox |  | OutBox |  | Document |  | Profile |
|-------|--|--------|--|----------|--|---------|

**Actions**

Select Route Doc:

Routing Action:

**Requisition**

|                               |                          |                   |
|-------------------------------|--------------------------|-------------------|
| Document Number: PRQSAR000013 | Document FY: 2000        | Total: \$4,775.00 |
| Category: RO                  | User Ref: 297060-235     | FOB:              |
| State Req #:                  | Research: N              | Type Funds: L     |
| Print Doc.: Y                 | Route Status: In Dept Rt | Type Order:       |
| PCC Code:                     | LDT Code:                | Cat/Order: N      |

Summary: COPIER RENTAL FOR 4-1-00 THROUGH 8-31-00

Arrived: 03/27/2000 at desk: in office: - for action: FYA/Approv

Dept/Sub: INRE FAMIS - BUSINESS COMPUTING SERVICES

**Vendor Information**

|   |  |
|---|--|
| <p>Vendor:</p> <p>17454521820<br/>XEROX CORP<br/>6836 AUSTIN CENTER BLVD<br/>SUITE #300<br/>AUSTIN TX 78745<br/>5129638521<br/>5129631452</p> | <p>Buyer:</p> <p>Invoice: FAMIS SERVICES<br/>TEXAS A&amp;M UNIVERSITY SYSTEM<br/>COLLEGE STATION , TX<br/>778407896</p> <p>Ship: FAMIS SERVICES<br/>TEXAS A&amp;M UNIVERSITY SYSTEM<br/>COLLEGE STATION , TX<br/>778407896</p> |
|   | <p>Contact: FRED STRZELEC<br/>9794586450</p>   |

**Item Information**

| Item | Description                                   | Qty  | UOM | Unit Price | Extended Price |
|------|---|------|-----|------------|----------------|
| 1.0  | Installation charge, 713-22-92100-0           | 1.00 | EA  | \$0.00     | \$0.00         |
| 2.0  | Xerox 1090, configuration 12 classification j | 5.00 | MO  | \$955.00   | \$4,775.00     |
| 3.0  | Removal charge, 713-22-92300-4                | 1.00 | EA  | \$0.00     | \$0.00         |

**Accounts**

| CC | FY   | Account           | Description    | Amount     |
|----|------|-------------------|----------------|------------|
| SA | 2000 | 297060-00000-5810 | FAMIS SERVICES | \$4,775.00 |

**Notes**

# Web-Based Document Routing and Approvals (Routing)

## DOCUMENT DETAIL, (continued)

**Routing Details**

**Routing History**

| Action    | Date             | Name              | Phone        | Office | Desk |
|-----------|------------------|-------------------|--------------|--------|------|
| Submitted | 03/27/2000 11:15 | Strzelec, Freda F | 979-458-6450 |        |      |
| Approved  | 03/27/2000 11:49 | Strzelec, Freda F | 979-458-6450 |        |      |

**Current Location / Approval Pending**

| Status        | Date             | Name               | Phone        | Office | Desk |
|---------------|------------------|--------------------|--------------|--------|------|
| Routed FYA to | 03/27/2000 11:49 | Cooper, Joycelyn A | 979-458-6450 |        |      |

**Dept/Unit Routing Status**

| Department Name | Dept Code     | Office | Status            |
|-----------------|---------------|--------|-------------------|
| FAMIS SERVICES  | SA-INRE-FAMIS | FAMIS  | Currently Routing |

### -- Actions --

This section is where you will select the desired routing action and then press the Submit button.

InBox | OutBox | Document | Profile

**Actions**

Select Route Doc: PRQSAR000013

Routing Action:

Requisition

Vendor Information

Item Information

Accounts

Notes

Routing Details

To take an action on a document, select the desired action from the Routing Action drop down menu.

**CANOPY**  
The Texas A&M University System

Routing (SA) | Home | Logout

InBox | OutBox | Document | Profile

**Actions**

Select Route Doc: PRQSAR000013

Routing Action:

The "Actions" you see will depend on the type of document.



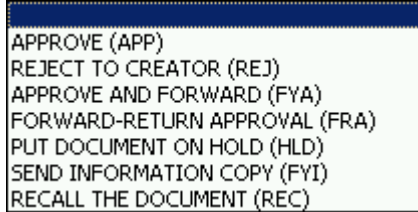
---

## Web-Based Document Routing and Approvals (Routing)

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### **\*\*Approve\*\***

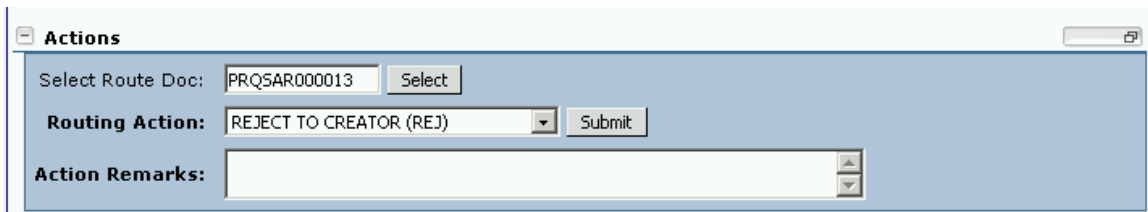
The approval choices for a document in your Inbox are:



If you select **Approve**, click on the Submit button to send the document forward in the Routing and Approvals process.

### **\*\*Reject\*\***

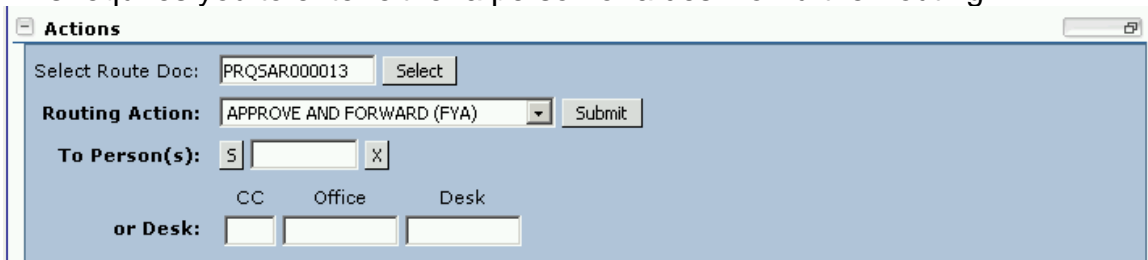
This action requires you to enter remarks about why you are rejecting the document.



A screenshot of the 'Actions' form. The 'Select Route Doc' field contains 'PRQ5AR000013' and a 'Select' button. The 'Routing Action' dropdown is set to 'REJECT TO CREATOR (REJ)' with a 'Submit' button. The 'Action Remarks' field is empty.

### **\*\*Approve and Forward\*\***

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



A screenshot of the 'Actions' form. The 'Select Route Doc' field contains 'PRQ5AR000013' and a 'Select' button. The 'Routing Action' dropdown is set to 'APPROVE AND FORWARD (FYA)' with a 'Submit' button. The 'To Person(s):' field contains 's' and an 'X' button. Below it are radio buttons for 'CC', 'Office', and 'Desk'. The 'or Desk:' field has three empty input boxes.

---

## Web-Based Document Routing and Approvals (Routing)

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### **\*\*Forward-Return Approval\*\***

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

The screenshot shows a web form titled "Actions" with a close button in the top right. The form contains the following fields and controls:

- Select Route Doc:** A text input field containing "PRQSAR000013" and a "Select" button to its right.
- Routing Action:** A dropdown menu showing "FORWARD-RETURN APPROVAL (FRA)" and a "Submit" button to its right.
- To Person(s):** A label followed by a small "S" button, a text input field, and an "X" button.
- or Desk:** A label followed by three text input fields, each with a label above it: "CC", "Office", and "Desk".

### **\*\*Put Document on Hold\*\***

Make this selection and press the "Submit" button to put the document on hold.

The screenshot shows a web form titled "Actions" with a close button in the top right. The form contains the following fields and controls:

- Select Route Doc:** A text input field containing "PRQSAR000013" and a "Select" button to its right.
- Routing Action:** A dropdown menu showing "PUT DOCUMENT ON HOLD (HLD)" and a "Submit" button to its right.

### **\*\*Send Information Copy\*\***

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

The screenshot shows a web form titled "Actions" with a close button in the top right. The form contains the following fields and controls:

- Select Route Doc:** A text input field containing "PRQSAR000013" and a "Select" button to its right.
- Routing Action:** A dropdown menu showing "SEND INFORMATION COPY (FYI)" and a "Submit" button to its right.
- To Person(s):** A label followed by three rows, each containing a small "S" button, a text input field, and an "X" button.
- or Desk:** A label followed by three text input fields, each with a label above it: "CC", "Office", and "Desk".

# Web-Based Document Routing and Approvals (Routing)

## \*\*Recall Document\*\*

This action requires you to enter remarks as to why you are recalling the document.

The screenshot shows a web interface with a tabbed menu at the top containing 'InBox', 'OutBox', 'Document', and 'Profile'. Below the menu is a section titled 'Actions' with a close button. It contains the following fields:

- 'Select Route Doc:' with the value 'PRQSAR000013' and a 'Select' button.
- 'Routing Action:' with a dropdown menu set to 'RECALL THE DOCUMENT (REC)' and a 'Submit' button.
- 'Action Remarks:' with an empty text area and vertical scroll arrows.

## -- DOCUMENT TYPE --

The document type determines the "title" and information displayed. Examples shown below are Requisition, Limited Purchase, and Purchase Order:

## \*\*Requisition\*\*

The screenshot shows the 'Requisition' section of the web interface. It features a tabbed menu with 'InBox', 'OutBox', 'Document', and 'Profile'. The 'Actions' panel is active, showing:

- 'Select Route Doc:' with 'PRQSAR000013' and a 'Select' button.
- 'Routing Action:' with a dropdown set to 'APPROVE AND FORWARD (FYA)' and a 'Submit' button.
- 'To Person(s):' with a dropdown set to 'S', an input field, and an 'X' button.
- 'or Desk:' with three input fields labeled 'CC', 'Office', and 'Desk'.

Below the 'Actions' panel is the 'Requisition' section with the following details:

- Document Number: PRQSAR000013 | Document FY: 2000 | Total: \$4,775.00
- Category: RO | User Ref: 297060-235 | FOB:
- State Req #: | Research: N | Type Funds: L
- Print Doc.: Y | Route Status: In Dept Rt | Type Order:
- PCC Code: | LDT Code: | Cat/Order: N
- Summary: COPIER RENTAL FOR 4-1-00 THROUGH 8-31-00
- Arrived: 03/27/2000 at desk: in office: - for action: FYA/Approv
- Dept/Sub: INRE FAMIS - BUSINESS COMPUTING SERVICES

At the bottom, there are expandable sections for:

- + Vendor Information
- + Item Information
- + Accounts
- + Notes
- + Routing Details

# Web-Based Document Routing and Approvals (Routing)

## \*\*Limited Purchase\*\*

InBox | OutBox | Document | Profile

Actions

**Limited Purchase**

|   |                   |                   |
|---|-------------------|-------------------|
| Document Number: PLPSAL000030                           | Document FY: 2000 | Total: \$2,700.00 |
| Category: LP  | User Ref: 300030- | FOB:              |
| State Req #:  | Research:         | Type Funds:       |
| Print Doc.: Y   | Route Status:     | Type Order:       |
| PCC Code:   | LDT Code:         | Cat/Order:        |
| Summary: LEATHER CHAIR                                  |                   |                   |
| Arrived: 03/28/2000 at desk: in office: SA- for action: |                   |                   |
| Dept/Sub: MISP - MIS PROJECT                            |                   |                   |

## \*\*Purchase Order\*\*

InBox | OutBox | Document | Profile

Actions

**Purchase Order**

|   |                       |                   |
|---|-----------------------|-------------------|
| Document Number: PPOAMP550043                         | Document FY: 1995     | Total: \$3,000.00 |
| Category: RO  | User Ref: 440001-2929 | FOB:              |
| State Req #:  | Research: N           | Type Funds: L     |
| Print Doc.: Y   | Route Status: Final   | Type Order: LOC   |
| PCC Code:   | LDT Code:             | Cat/Order:        |
| Summary: TEST FOR MULTI-CAMPUS                        |                       |                   |
| Arrived: 11/03/2003 at desk: in office: - for action: |                       |                   |
| Dept/Sub: XXXX - JANNA'S TEST DEPARTMENT              |                       |                   |

# Web-Based Document Routing and Approvals (Routing)

## -- VENDOR INFORMATION --

InBox | OutBox | Document | Profile

+ Actions

+ Requisition

**Vendor Information**

**Vendor:**  
 17454521820  
 XEROX CORP  
 6836 AUSTIN CENTER BLVD  
 SUITE #300  
 AUSTIN TX 78745  
 5129638521  
 5129631452

**Buyer:**

**Invoice:** FAMIS SERVICES  
 TEXAS A&M UNIVERSITY SYSTEM  
 COLLEGE STATION , TX  
 778407896

**Contact:** FRED STRZELEC  
 9794586450

**Ship:** FAMIS SERVICES  
 TEXAS A&M UNIVERSITY SYSTEM  
 COLLEGE STATION , TX  
 778407896

+ Item Information

+ Accounts

+ Notes

## -- ITEM INFORMATION --

InBox | OutBox | Document | Profile

+ Actions

+ Requisition

+ Vendor Information

**Item Information**

| Item | Description                                   | Qty  | UOM | Unit Price | Extended Price |
|------|---|------|-----|------------|----------------|
| 1.0  | Installation charge, 713-22-92100-0           | 1.00 | EA  | \$0.00     | \$0.00         |
| 2.0  | Xerox 1090, configuration 12 classification j | 5.00 | MO  | \$955.00   | \$4,775.00     |
| 3.0  | Removal charge, 713-22-92300-4                | 1.00 | EA  | \$0.00     | \$0.00         |

+ Accounts

+ Notes

+ Routing Details

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# Web-Based Document Routing and Approvals (Routing)

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## -- Accounts --

| CC | FY   | Account           | Description    | Amount     |
|----|------|-------------------|----------------|------------|
| SA | 2000 | 297060-00000-5810 | FAMIS SERVICES | \$4,775.00 |

## -- Notes --

This section will display notes that are on a document, and/or allow you to add additional notes to the document. Click on the “+” symbol by “Add Route Notes” to access the field for adding routing notes.

Click on the “Save” button after typing the notes to add them to the document. Click on the “Clear” button to erase the information entered prior to saving.

Clear Save

# Web-Based Document Routing and Approvals (Routing)

## -- Routing Details --

|  |                  |                    |                   |               |             |         |
|--|------------------|--------------------|-------------------|---------------|-------------|---------|
| InBox  |                  | OutBox             |                   | Document      |             | Profile |
| <input type="checkbox"/> Actions <span style="float: right;">[icon]</span> |                  |                    |                   |               |             |         |
| <input type="checkbox"/> Requisition                                       |                  |                    |                   |               |             |         |
| <input type="checkbox"/> Vendor Information                                |                  |                    |                   |               |             |         |
| <input type="checkbox"/> Item Information                                  |                  |                    |                   |               |             |         |
| <input type="checkbox"/> Accounts  |                  |                    |                   |               |             |         |
| <input type="checkbox"/> Notes   |                  |                    |                   |               |             |         |
| <input checked="" type="checkbox"/> <b>Routing Details</b>                 |                  |                    |                   |               |             |         |
| <input type="checkbox"/> <b>Routing History</b>                            |                  |                    |                   |               |             |         |
| <b>Action</b>  | <b>Date</b>      | <b>Name</b>        | <b>Phone</b>      | <b>Office</b> | <b>Desk</b> |         |
| Submitted  | 03/27/2000 11:15 | Strzelec, Freda F  | 979-458-6450      |               |             |         |
| Approved   | 03/27/2000 11:49 | Strzelec, Freda F  | 979-458-6450      |               |             |         |
| <input type="checkbox"/> <b>Current Location / Approval Pending</b>        |                  |                    |                   |               |             |         |
| <b>Status</b>  | <b>Date</b>      | <b>Name</b>        | <b>Phone</b>      | <b>Office</b> | <b>Desk</b> |         |
| Routed FYA to  | 03/27/2000 11:49 | Cooper, Joycelyn A | 979-458-6450      |               |             |         |
| <input type="checkbox"/> <b>Dept/Unit Routing Status</b>                   |                  |                    |                   |               |             |         |
| <b>Department Name</b>   | <b>Dept Code</b> | <b>Office</b>      | <b>Status</b>     |               |             |         |
| FAMIS SERVICES   | SA-INRE-FAMIS    | FAMIS              | Currently Routing |               |             |         |

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# Web-Based Document Routing and Approvals (Routing)

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## PROFILE

### -- DISPLAY SETTINGS --

The Profile tab displays settings for notifying you when documents are routed to you. These settings include what types of documents to display, how often, and shows the email address to be used.

Make any modifications necessary and press the SAVE button to record the changes.

InBox | OutBox | Document | Profile

### Routing Notification Profile for Cooper, Joycelyn A

**Notify Me by Email for:**

**The Following Routing Actions:**

Approvals Only  All (include notifications)  None (No Email)

**At the Following Frequency:**

Every Document  Daily  Weekly  Monthly

**At the Following Email Address:**

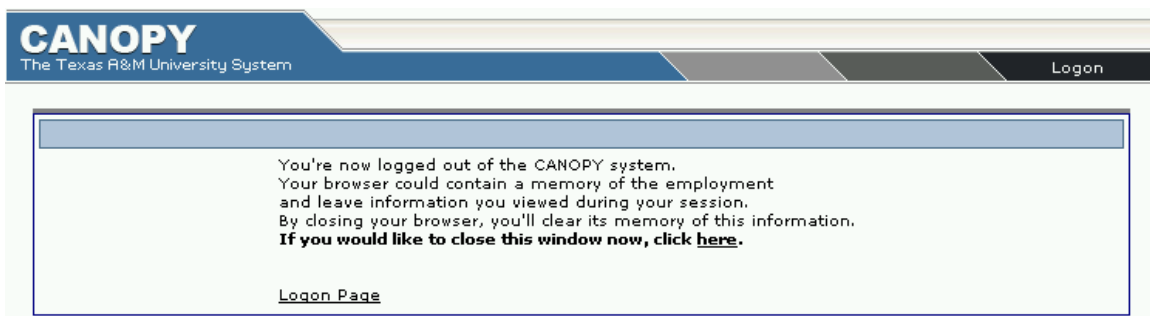
## LOGOUT

### -- END ONLINE SESSION --

To complete your on-line session, click on the LOGOUT tab.



You will then see the following screen:



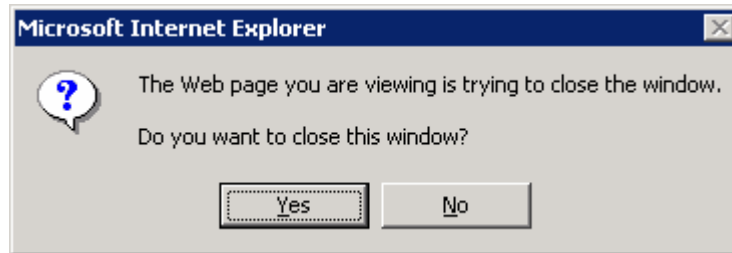


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## Web-Based Document Routing and Approvals (Routing)

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Close your browser window or click on the “CLICK HERE” link provided to have the window closed for you. The following alert box will be displayed:



Press the “YES” button to close the browser window.

If you wish to log back on, click on the “LOGON” tab.

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# Web-Based Document Routing and Approvals (Routing)

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T:\Fa\DOC\WRKNPRCS\ROUTING\racanopymanual.doc  
2/2/2004 10:52 AM