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:

<table>
<thead>
<tr>
<th>PUR</th>
<th>Purchasing related documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Limited Purchase</td>
</tr>
<tr>
<td></td>
<td>• Exempt &amp; Delegated Purchases</td>
</tr>
<tr>
<td></td>
<td>• Requisitions</td>
</tr>
<tr>
<td></td>
<td>• Purchase Orders</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AP</th>
<th>Accounts Payable related documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Purchasing Invoice Problem</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FA</th>
<th>Financial Accounting related documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• DBR – Departmental Budget Request</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PAY</th>
<th>Payroll/Budget related documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• EPA – Employee Payroll Action</td>
</tr>
</tbody>
</table>
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.

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.
Basic Concepts (cont’d)

**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
```

![Diagram of routing document identification number]

**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.
Basic Concepts (cont’d)

**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.
Basic Concepts (cont’d)

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. **Executive:** 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. **Processing:** 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

Notice the INFO message that there is 1 item in the Inbox!!
CANOPY Inbox, Outbox & Other Functions (cont’d)

Four TABS provide the access to the user’s **Inbox, Outbox, Document and Profile** Information.
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** 📝 displays any notes associated with the document

**Time** 🕒 changes display to include time of arrival

**Default View** 🌐 changes view based on document type, like EPA

**Column Filters** 🗂️ opens column filters

**Light bulb** 🎈 displays ten most recently used documents
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.

Substitutes
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 displays ten most recently used documents

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.
**Substitutes**
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
CANOPY Inbox, Outbox & Other Functions (cont’d)

**DOCUMENT INFORMATION & VENDOR INFORMATION - PURCHASING**

<table>
<thead>
<tr>
<th>Document</th>
<th>R802767</th>
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</thead>
<tbody>
<tr>
<td>Category</td>
<td>RO</td>
</tr>
<tr>
<td>Print Doc</td>
<td>270300-08517</td>
</tr>
<tr>
<td>PCC Code</td>
<td>IBM N5300 STORAGE SYSTEM (BOLTON)</td>
</tr>
<tr>
<td>Summary</td>
<td>Ditto</td>
</tr>
<tr>
<td>Dept/Sub</td>
<td>EIS - Enterprise Information Systems</td>
</tr>
</tbody>
</table>

**Vendor Information**

<table>
<thead>
<tr>
<th>Reimburse To</th>
<th>Computing Information Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice To</td>
<td>ATTN: DOROTHY LEWIS</td>
</tr>
<tr>
<td>Ship To</td>
<td>CENTER COLLEGE STATION, TX 77843-3303</td>
</tr>
<tr>
<td>Buyer</td>
<td>RKW / WOLF, RICK 979-845-8538</td>
</tr>
<tr>
<td>Contact</td>
<td>Loretta Hayes 979-845-8421</td>
</tr>
</tbody>
</table>

**DEPARTMENT & LINE ITEMS & ACCOUNT SUMMARIES - PURCHASING**

<table>
<thead>
<tr>
<th>Department Name</th>
<th>Electronic Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>EIS</td>
<td>ENTERPRISE INFORMATION SYSTEMS</td>
</tr>
</tbody>
</table>

**LINE ITEMS**

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<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>TotalStorage System for Production, IBM N5300 (more)</td>
<td>1.00 EA</td>
<td>$97,144.00</td>
<td>$97,144.00</td>
</tr>
<tr>
<td>2.0</td>
<td>TotalStorage System for Disaster Recovery, (more)</td>
<td>1.00 EA</td>
<td>$97,144.00</td>
<td>$97,144.00</td>
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<tr>
<td>3.0</td>
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<td>2.00 EA</td>
<td>$3,350.00</td>
<td>$6,700.00</td>
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<tr>
<td>4.0</td>
<td>Total for Cisco Switches for Disaster (more)</td>
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<td>$3,350.00</td>
<td>$6,700.00</td>
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<td>5.0</td>
<td>TotalStorage Software for Production, IBM (more)</td>
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<td>$83,211.00</td>
<td>$83,211.00</td>
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<tr>
<td>6.0</td>
<td>TotalStorage System Software for Disaster (more)</td>
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<td>$83,211.00</td>
<td>$83,211.00</td>
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<td>7.0</td>
<td>3 Years 24x7, 4 Hour Response On-Site (more)</td>
<td>2.00 EA</td>
<td>$20,216.00</td>
<td>$40,432.00</td>
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<tr>
<td>8.0</td>
<td>3 Years 24x7 Software Support/Subscription (more)</td>
<td>2.00 EA</td>
<td>$4,110.00</td>
<td>$8,220.00</td>
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<td>9.0</td>
<td>3 Years 24x7 Support for (4) 2960 Cisco (more)</td>
<td>4.00 EA</td>
<td>$844.00</td>
<td>$3,376.00</td>
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<td>1.00 EA</td>
<td>$9,694.00</td>
<td>$9,694.00</td>
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<tr>
<td>11.0</td>
<td>IBM Tivoli Storage Manager Extended Edition (more)</td>
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<td>$9,694.00</td>
<td>$9,694.00</td>
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<tr>
<td>12.0</td>
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<td>$22,500.00</td>
<td>$22,500.00</td>
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<td>13.0</td>
<td>Travel &amp; Living Expenses (more)</td>
<td>1.00 EA</td>
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<td>$2,300.00</td>
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<tr>
<td>14.0</td>
<td>Total Solution Discount (more)</td>
<td>1.00 EA</td>
<td>($24,457.00)</td>
<td>($24,457.00)</td>
</tr>
</tbody>
</table>

**ACCOUNT SUMMARIES**

<table>
<thead>
<tr>
<th>Campus Code</th>
<th>Fiscal Year</th>
<th>Account</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>2008</td>
<td>210480-10015 8435 Computer Equipment</td>
<td>GENERAL EIS SUPPORT</td>
<td>$205,731.00</td>
</tr>
<tr>
<td>02</td>
<td>2008</td>
<td>210480-10015 8440 Purchase &amp; Maint of Cmplt Software</td>
<td>GENERAL EIS SUPPORT</td>
<td>$185,816.00</td>
</tr>
<tr>
<td>02</td>
<td>2008</td>
<td>210480-10015 5536 MBR - Cmplt Equip - not TAMU CIS</td>
<td>GENERAL EIS SUPPORT</td>
<td>$43,808.00</td>
</tr>
<tr>
<td>02</td>
<td>2008</td>
<td>210480-10015 5521 MBR - Cmplt Software - not TAMU CIS</td>
<td>GENERAL EIS SUPPORT</td>
<td>$8,220.00</td>
</tr>
<tr>
<td>02</td>
<td>2008</td>
<td>210480-10015 5355 Consultant Services - Computer</td>
<td>GENERAL EIS SUPPORT</td>
<td>$2,300.00</td>
</tr>
</tbody>
</table>

Routing and Approvals User Manual
### NOTES & ROUTING NOTES & DOCUMENT HISTORY

#### NOTES

<table>
<thead>
<tr>
<th>Title</th>
<th>Note Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc Header</td>
<td>&gt;&gt; note entered 03/22/08 BY HAYES, LORETTA L. 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 DOCUMENTATION FOR THIS REQUEST.</td>
</tr>
</tbody>
</table>

#### ROUTING NOTES

<table>
<thead>
<tr>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;&gt; Reason held on 03/10/08 by KUBICA, KAREN G: RKW</td>
</tr>
<tr>
<td>&gt;&gt; Reason held on 03/10/08 by TENORIO, FELISITA: REQ. TO TNL</td>
</tr>
<tr>
<td>&gt;&gt; Reason held on 03/10/08 by KUBICA, KAREN G: RKW</td>
</tr>
<tr>
<td>&gt;&gt; Item Transfer on 03/31/08 to Doc: PB03914</td>
</tr>
</tbody>
</table>

#### DOCUMENT HISTORY

<table>
<thead>
<tr>
<th>Desk</th>
<th>Fwd Name</th>
<th>Office</th>
<th>Date</th>
<th>Name</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPROVER</td>
<td>02-EIS</td>
<td></td>
<td>3/7/2008 1:53:30 PM</td>
<td>Dunlap, Sophia A</td>
<td>979-458-3466</td>
<td>Approved</td>
</tr>
<tr>
<td>CENTRALDESK</td>
<td>02-PURCHASING</td>
<td>3/7/2008 3:35:26 PM</td>
<td>Constancio, Angelita G</td>
<td>979-845-4570</td>
<td>Approved/FYP</td>
<td></td>
</tr>
<tr>
<td>COMP-C1</td>
<td>02-PURCHASING</td>
<td>3/10/2008 7:24:28 AM</td>
<td>Hayes, Loretta A</td>
<td>979-845-8421</td>
<td>Discarded</td>
<td></td>
</tr>
<tr>
<td>COMP-C5</td>
<td>02-PURCHASING</td>
<td>3/10/2008 9:27:15 AM</td>
<td>Tenorio, Felista</td>
<td>979-845-4570</td>
<td>Approved/FYP</td>
<td></td>
</tr>
<tr>
<td>COMP-C6</td>
<td>02-PURCHASING</td>
<td>3/10/2008 9:27:32 AM</td>
<td>Tenorio, Felista</td>
<td>979-845-4570</td>
<td>Held</td>
<td></td>
</tr>
<tr>
<td>COMP-C7</td>
<td>02-PURCHASING</td>
<td>3/10/2008 9:28:49 AM</td>
<td>Kubica, Karen G</td>
<td>979-845-4570</td>
<td>Discarded</td>
<td></td>
</tr>
<tr>
<td>COMP-C8</td>
<td>02-PURCHASING</td>
<td>3/10/2008 11:09:32 AM</td>
<td>Kubica, Karen G</td>
<td>979-845-4570</td>
<td>Transfer</td>
<td></td>
</tr>
<tr>
<td>COMP-C9</td>
<td>02-PURCHASING</td>
<td>3/18/2008 7:45:31 AM</td>
<td>Hayes, Loretta A</td>
<td>979-845-4570</td>
<td>Discarded</td>
<td></td>
</tr>
<tr>
<td>COMP-C10</td>
<td>02-PURCHASING</td>
<td>4/1/2008 7:59:20 AM</td>
<td>Hayes, Loretta A</td>
<td>979-845-8421</td>
<td>Discarded</td>
<td></td>
</tr>
</tbody>
</table>

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

**CURRENT LOCATION**

*No records found to display.*

**DEPT ROUTING**

<table>
<thead>
<tr>
<th>Desk</th>
<th>Fwd Name</th>
<th>Office</th>
<th>Date</th>
<th>Dept. Code</th>
<th>Department Name</th>
<th>Status</th>
</tr>
</thead>
</table>

**DOCUMENT HELD BY**

*No records found to display.*

**FYI COPY**

*No records found to display.*
Actions
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)

**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:
**REJECT – (REJ)**

If you choose Reject (REJ) and click on the Submit Button, a new box will display to enter Action Remarks 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.

**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.
**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.

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. Action Remarks are required.
**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 person(s) or a desk for further routing.

**DISCARD – (DIS)**
This action discards Notification and Final copies from your Inbox.
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.

**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.

**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.
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.

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.

FAMIS Bulletin Board
Steps for Using the FAMIS Screens

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

**Screen 910 - Document Inbox (Panel 1)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Document ID</th>
<th>Office ID</th>
<th>Desk ID</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRQSAR000013</td>
<td>PRQSAR000013</td>
<td>INDIVIDUAL</td>
<td></td>
<td>FYA/Approve</td>
<td>FYA/Rt</td>
</tr>
<tr>
<td>PRQSAR000009</td>
<td>FURNITURE MY OFFICE</td>
<td>Notify</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000019</td>
<td>RENTAL OF A XEROX 1090</td>
<td>Notify</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000024</td>
<td>FURNITURE MY OFFICE</td>
<td>Notify</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000024</td>
<td>FURNITURE MY OFFICE</td>
<td>Notify</td>
<td>Final</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLPSAL0006</td>
<td>OFFICE FURNITURE</td>
<td>ed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLPSAL00075</td>
<td>MAHOGANY DESK</td>
<td>ed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR100001</td>
<td>COMPUTER MONITOR FOR JOHN JONES</td>
<td>ed</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PF Keys to scroll display and view more information

*** End of List 8 Document(S) Found ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp Discd RHist Sel All Left Right

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

**Screen 910 - Document Inbox (Panel 2)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLPSAL00006</td>
<td>2000 CARLSON, COLLEEN C</td>
<td>03/28/2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLPSAL00075</td>
<td>2000 CARLSON, COLLEEN C</td>
<td>03/28/2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR100001</td>
<td>2001 CARLSON, COLLEEN C</td>
<td>11/21/2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PF Keys to scroll display and view more information

*** End of List 8 Document(S) Found ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp Discd RHist Sel All Left Right

**Screen 910 - Document Inbox (Panel 3)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Office ID</th>
<th>Desk ID</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRQSAR000013</td>
<td>INDIVIDUAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000009</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000019</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR000024</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PF Keys to scroll display and view more information

*** End of List 8 Document(S) Found ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp Discd RHist Sel All Left Right
2. **Select the document** 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)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>N</th>
<th>Doc Summary</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>PRQSAR000013 * COPIER RENTAL FOR 4-1-00 THROUGH 8-31-00 FYA/Approve FYA/FRA Rt</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Review the Cover Sheet for the document (in the pop-up window).

**Screen 910 – Purchasing Document Cover Sheet**

Press PF6 to view document summary.

---

Routing and Approvals User Manual Page III-20
3. Press **PF6** to view the document summary.

**Screen 910 – Cover Sheet Document Summary, PF6 Summ**

```
*************** Document Summary ***************
R000013                Number of Desc Lines: 5_ Page: 1_ Of 4
+---------------------------------------------------------------------+
| DOC: R000013             | USER REF: 297060-1 |
+---------------------------------------------------------------------+
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 COLLEGE STATION TX 77840-7896 COLLEGE STATION TX 77840-7896
PF4=Exit  PF7=Bck  PF8=Fwrd
```

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

```
*************** Document Summary ***************
R000013                Number of Desc Lines: 5_ Page: 2_ Of 4
ITEM        DESCRIPTION     QUANTITY  UOM    UNIT PRICE   XTENSION PRICE  
----- --------------------- --------- ---- -------------- --------------  
1                              1.00 EA            0.00           0.00  
Installation charge, 713-22-92100-0  
2                              5.00 MO          955.00       4,775.00  
Xerox 1090, configuration 12 classification j  
monthly rental rate (includes supplies)  
included 75,000 copies/mo  
75,001 - 150,000 copies at $.00424 each  
150,001 - 200,000 copies at $.0001 each  
3                              1.00 EA            0.00           0.00  
Removal charge, 713-22-92300-4  
Items Total       4,775.00  
PF4=Exit  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 Distribution <<  
SA 2000 297060-00000-5810 FAMIS SERVICES  
Accounts Total        4,775.00  
Catalogue Order: N  
PF4=Exit  PF7=Bck  PF8=Fwrd
```
**Screen 910 – Cover Sheet Window, PF6 Doc. Summary (cont’d)**

<table>
<thead>
<tr>
<th>Screen 910 – Cover Sheet Window, PF6 Doc. Summary (cont’d)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Summary</strong></td>
</tr>
<tr>
<td>R000013</td>
</tr>
<tr>
<td><em>Number of Desc Lines: 5_  Page: 4_ Of 4</em></td>
</tr>
</tbody>
</table>

**Delivery Data:**
- **Delivery Req'd By:**
  - **Dept Contact:** FRAN FONTAINE
  - **Phone No.:** 979-458-4444

**Suggested Vendors >>**
- Vn ID: 1vvvvvvvvv or FEI: XEROX CORP
- Addr: 6836 AUSTIN CENTER BLVD SUITE #300 AUSTIN TX 78745
- PH: 5129638888 Fax: 5129631111

**Routing Notes Exist**

**Screen 910 - Pop-Up Window**

| Screen: ___                                      |
| **Action:** APP                                  |
| **Status:** FYA/FRA Rt                           |
| **Doc ID:** PRQSAR000013                         |
| **Requested Action:** FYA/Approve                |
| **Doc Summary:** COPIER RENTAL FOR 4-1-00 THROUGH 8-31-00 |
| **Released:** 03/27/2000  by: FONTAINE, FRAN F  |
| **Contact Person:** FRAN FONTAINE               |
| **Dept Name:** FAMIS SERVICES                    |
| **Doc Total:** 4,775.00 Untransferred Total: 4,775.00 |

**Requisition No:** R000013

**Press PF4 to exit pop-up window**

4. **Key in your desired action – APP, REJ**

5. **Repeat steps 1 - 4 for additional documents or press PF4 to exit and return to Screen 910.**

**Details for the FAMIS Screens and Field Values can be found in a later section of this Manual.**
Electronic Office Basics

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

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M91</td>
<td>Electronic Office Mgmt Menu</td>
</tr>
<tr>
<td>Screen</td>
<td>___</td>
</tr>
<tr>
<td>* ---</td>
<td>Departmental Functions ----- * --- Inquiry Functions ----- *</td>
</tr>
<tr>
<td>920</td>
<td>Dept View Create/Modify</td>
</tr>
<tr>
<td>924</td>
<td>Creator Desk Modify</td>
</tr>
<tr>
<td>922</td>
<td>Approver Desk Create/Modify</td>
</tr>
<tr>
<td>923</td>
<td>Signer Desk Modify</td>
</tr>
<tr>
<td>921</td>
<td>Dept Paths Create/Modify</td>
</tr>
<tr>
<td>928</td>
<td>Dept View Delete</td>
</tr>
<tr>
<td>930</td>
<td>Desk Copy</td>
</tr>
<tr>
<td>* ---</td>
<td>Administrative Functions --- *</td>
</tr>
<tr>
<td>943</td>
<td>Security Signer Desk</td>
</tr>
<tr>
<td>940</td>
<td>Office Create/Modify</td>
</tr>
<tr>
<td>941</td>
<td>Unit to Office Assignment</td>
</tr>
<tr>
<td>944</td>
<td>Office Delete</td>
</tr>
<tr>
<td>950</td>
<td>Electronic Documents Profiles</td>
</tr>
</tbody>
</table>

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.
Essentials of Routing Extended

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 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, 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.
Essentials of Routing Extended (cont’d)

**Executive:** 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**

```
CREATOR DESK
Mary
Jim

SIGNER DESK
Tom
Craig
(s) Janice
```
**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.

**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 whole dollar amounts 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
Essentials of Routing Extended (cont’d)

**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
Essentials of Routing Extended (cont’d)

**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)
   OR
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
# Productivity Aids Inquiry

## Aids for Management of the Routing Structures

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

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**

<table>
<thead>
<tr>
<th>Campus Cd</th>
<th>Office</th>
<th>Desk</th>
<th>Status</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>CREATE DSK</td>
<td>PURCHASING</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>CREATE PLP</td>
<td>PURCHASING</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>GRAPHICS</td>
<td>CREATE DSK</td>
<td>VIEW01</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>HUBS</td>
<td>CREATE DSK</td>
<td>HUBSVW</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>MAIL</td>
<td>CREATE DSK</td>
<td>MAILVW</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>LOGISTICS</td>
<td>CREATE DSK</td>
<td>LOGISTICS</td>
<td></td>
</tr>
</tbody>
</table>

**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)

**Action Line**

- ◆ Name: 20 characters
  Identify the name of the person 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 campus code 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.
Screen 915 – Approval Profile by Name (cont’d)

Office: 10 characters
Displays the *title of the office* in which the person has approval authority.

Desk: 10 characters
Identifies the *name of the desk* where the person has approval authority.

Status: Help 1 character
Indicate the status of how the document should go to the desk.
Blank = Approval
I = Information
N = Notification

View: 10 characters
Displays the *name of the view* 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.
List Your Electronic Offices

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**

<table>
<thead>
<tr>
<th>Office</th>
<th>Description</th>
<th>View</th>
<th>View</th>
<th>Office Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>A&amp;M POLICE</td>
<td>TEXAS A&amp;M UNIVERSITY POLICE D</td>
<td>ADDISON, ALLEY A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACADEMY</td>
<td>ACADEMY FOR ADVANCED TELECOM</td>
<td>WARREN, WENDY W</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCTNG</td>
<td>ACCOUNTING</td>
<td>LANE, LEONA L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ADRC</td>
<td>OFFICE OF ADMISSIONS AND RECO</td>
<td>RALEY, RHONDA R</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AECNCTR</td>
<td>CENTER FOR ACADEMIC ENHANCEMENT</td>
<td>NEIMANN, NANCE N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AEROSPACE</td>
<td>AEROSPACE ENGINEERING DEPT</td>
<td>GARLAND, GARY G</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AG ECON</td>
<td>AGRICULTURAL ECONOMICS</td>
<td>DUNLAP, DIANE D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AGIS</td>
<td>ADMINISTRATIVE GEOGRAPHIC INF</td>
<td>MORRIS, MONTE M</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AGRENGR</td>
<td>AGRICULTURAL ENGINEERING</td>
<td>DOWNS, DONALD D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AGRIED</td>
<td>AGR EDUCATION</td>
<td>DOWNS, DONALD D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANSCDEPT</td>
<td>ANIMAL SCIENCE</td>
<td>DOWNS, DONALD D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTH</td>
<td>ANTHROPOLOGY DEPARTMENT</td>
<td>HALEY, HARLAN H</td>
<td></td>
<td></td>
</tr>
<tr>
<td>APUPAS</td>
<td>ASSOC PROVOST FOR UNDERGRAD P</td>
<td>NEILEY, NONA N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARCHOO</td>
<td>COLLEGE OF ARCHITECTURE ACCOU</td>
<td>GREER, GARY G</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to continue

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help 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 the 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)

**Action Line**
Office: 10 characters
Identify the office to be positioned at the top of the screen.

**Screen Information**
Office: 10 characters
Indicates the short name for the electronic office displayed.

Description: 36 characters
Displays the description for the office listed.

Processing View: 10 characters
Shows the name of the processing view desk.

Exec View: 4 characters
Shows the word “EXEC” if the department/subdepartment is assigned to an executive office.

Manager: 30 characters
Indicates the name of the electronic office manager 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 by Office

<table>
<thead>
<tr>
<th>S</th>
<th>Dept</th>
<th>Sub-Dept</th>
<th>Description</th>
<th>Link Type</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>FISC</td>
<td></td>
<td>FINANCIAL MANAGEMENT OPERATIONS</td>
<td>D</td>
<td>PIPVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>AAR</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - ADMIN ACCOUNTING/REPORTING</td>
<td>D</td>
<td>AARVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>AC</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - ACCOUNTING CONTROL</td>
<td>D</td>
<td>ACVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>ACCTG</td>
<td>FINANCIAL MANAGEMENT SVCS - ACCOUNTING</td>
<td>D</td>
<td>OPERATIONS</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>APS</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - ACCOUNTING PROCESSING</td>
<td>D</td>
<td>APSVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>EPAY</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - EPAY</td>
<td>D</td>
<td>EPAYVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>PMO</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - ACCOUNTING SERVICES</td>
<td>D</td>
<td>PMOVIEW</td>
</tr>
<tr>
<td>-</td>
<td>FISC</td>
<td>OPS</td>
<td>FINANCIAL MANAGEMENT OPERATIONS - OPERATIONS</td>
<td>D</td>
<td>OPERATIONS</td>
</tr>
</tbody>
</table>

**End of Record List - 8 Record(s) Found**

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)

**Action Line**

◆ Office: 10 characters
Identify the name of the office whose departments/subdepartments you wish to view.

**Screen Information**

Dept: 10 characters
Indicates the names of the departments within the office.

Sub-Dept: 10 characters
Displays the name of the subdepartment within the department.

Description: 40 characters
Identifies the description given to the unit (department/subdepartment combination).
Screen 935 – Dept/SDept by Office (cont’d)

**Link Type:**
1 character
Indicates the type of view displayed: D (departmental) E (executive) or P (processing) view.

**View:**
10 characters/digits
Indicates the name of the view 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 required for all electronic offices.

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

Screen 936 -Views by Office

<table>
<thead>
<tr>
<th>S View Name</th>
<th>View Description</th>
<th>Nbr Units</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURCHASING</td>
<td>PURCHASING SERVICES</td>
<td></td>
<td>D</td>
</tr>
<tr>
<td>PURS</td>
<td>PURCHASING/STORES PROCESSING PATHS</td>
<td></td>
<td>P</td>
</tr>
<tr>
<td>PURS/WRHS</td>
<td>MATERIALS SERVICES HOLDING AREA WAREHOUSE</td>
<td></td>
<td>D</td>
</tr>
</tbody>
</table>

** End of Record List - 3 Record(s) Found
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help  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 title of the office for which you want to see the names of all the valid views.
### Screen 936 – Views by Office (cont’d)

<table>
<thead>
<tr>
<th><strong>View:</strong></th>
<th>10 characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify the view you wish to position at the top of the screen.</td>
<td></td>
</tr>
</tbody>
</table>

#### Screen Information

<table>
<thead>
<tr>
<th><strong>View Name:</strong></th>
<th>10 characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displays the name(s) of the views within the electronic office listed in alphabetical order.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>View Description:</strong></th>
<th>10 characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shows text description each of the views.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Nbr Units:</strong></th>
<th>9 digits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifies of the number of units assigned to the view.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Type:</strong></th>
<th>1 character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicates the type of view displayed. D (departmental), E (executive), and P (processing).</td>
<td></td>
</tr>
</tbody>
</table>

#### 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 Department paths have Signer Desk, these are not listed on this screen.

Screen 937 - Desks by Office

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 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 **title of the electronic office** whose desks you wish to view.

Desk: 10 characters  
Identify the **name of the desk to position at the top** of the screen.

**Screen Information**

Desk: 10 characters  
Indicates the **name(s) of the desks created under the office**; listed in alphabetical order.

View: 10 characters  
Shows the name of the **desk view**.

Description: 60 characters  
Displays **text describing the desks** within the office.

**Additional Functions**

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

PF7  
Names of Desk Assignees  
Displays the **names of the desk assignees** in a pop-up window when the cursor is anywhere on a desk line.
List Documents for Office / Desk

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)

<table>
<thead>
<tr>
<th>Document ID</th>
<th>FY</th>
<th>Creator</th>
<th>Created</th>
<th>Arrived</th>
<th>Days</th>
<th>User's Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPO02P602188</td>
<td>2006</td>
<td>LYLES, LORNA L</td>
<td>02/20/2006</td>
<td>02/21/2006</td>
<td>470</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A734236</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/01/2007</td>
<td>06/01/2007</td>
<td>5</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735148</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735151</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735242</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800153</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800155</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800156</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
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<td>PRQ08R800157</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800158</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800154</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R703900</td>
<td>2007</td>
<td>CIELY, CARLA C</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td></td>
<td>Approver</td>
</tr>
</tbody>
</table>

**Press ENTER to view more documents**

Screen 938 - Office/Desk Workload (Panel 2)

<table>
<thead>
<tr>
<th>Document ID</th>
<th>FY</th>
<th>Creator</th>
<th>Created</th>
<th>Arrived</th>
<th>Days</th>
<th>User's Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPO02P602188</td>
<td>2006</td>
<td>LYLES, LORNA L</td>
<td>02/20/2006</td>
<td>02/21/2006</td>
<td>470</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A734236</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/01/2007</td>
<td>06/01/2007</td>
<td>5</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735148</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735151</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PLP02A735242</td>
<td>2007</td>
<td>WOMAK, WESLEY W</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td>1</td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800153</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800155</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800156</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800157</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800158</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R800154</td>
<td>2008</td>
<td>HALEY, HOLLY H</td>
<td>06/04/2007</td>
<td>06/04/2007</td>
<td></td>
<td>Approver</td>
</tr>
<tr>
<td>PRQ08R703900</td>
<td>2007</td>
<td>CIELY, CARLA C</td>
<td>06/05/2007</td>
<td>06/05/2007</td>
<td></td>
<td>Approver</td>
</tr>
</tbody>
</table>

**Press ENTER to view more documents**
Screen 938 – Office/Desk Workload (cont’d)

Screen 938 - Office/Desk Workload (Panel 3)

<table>
<thead>
<tr>
<th>Document ID</th>
<th>CC</th>
<th>Unit</th>
<th>Office</th>
<th>Desk</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPO02P602188</td>
<td>02</td>
<td>PURCHASING ADMIN</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLP02A734236</td>
<td>02</td>
<td>PURCHASING APPROVE</td>
<td>PURCHASING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLP02A735148</td>
<td>02</td>
<td>PURCHASING APPROVE</td>
<td>PURCHASING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLP02A735151</td>
<td>02</td>
<td>PURCHASING APPROVE</td>
<td>PURCHASING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLP02A735242</td>
<td>02</td>
<td>PURCHASING APPROVE</td>
<td>PURCHASING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800153</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800156</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800158</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800157</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800155</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R800154</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQ02R703900</td>
<td>02</td>
<td>PURCHASING CENTRLDESK</td>
<td>PURS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*** Press ENTER to view more documents ***

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 title of the office governing the documents awaiting action.

◆ **Desk:** 10 characters
  
  Identify the name of the desk housing the documents awaiting action.

◆ **Form:** 3 characters  
  
  Indicate the type of document to be displayed.

**Screen Information**

Panel 1

**Document ID:** 12 characters/digits

Displays 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 routing notes are attached to the document.

Doc Summary: 40 characters
Displays a short description of the document.

Requested Action: 11 characters
Identifies the action that needs to be taken on the document.

Status: 14 characters
Shows a document’s progress through the routing and approval system. 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

Panel 2
FY: 4 digits
Indicates the fiscal year in which the document was created.

Creator: 18 characters
Identifies the person who created and sent the document into the routing and approval system.

Created: 8 digits
Represents the date the document was created.

Arrived: 8 digits
Indicates the date the document arrived at its current office/desk.

Days: 5 digits
Represents the number of days that the document has been located at its current office/desk.

User’s Level: 12 characters
Indicates the type of user (i.e. their level) in whose Inbox the document is located.

Panel 3
Current

CC: 2 characters/digits
Displays the campus code to which the document has currently been routed.
Screen 938 – Office/Desk Workload (cont’d)

**Unit:** 10 characters
Identifies the unit to which the document has currently been routed.

**Office:** 10 characters
Indicates the office at which the document is currently located.

**Desk:** 10 characters/digits
Represents the desk at which the document is currently located.

**Additional Functions**

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

**PF7**
**Routing History**
**RHist**
Shows the routing information for the document.

**PF7**
**Names of Desk Assignees**
**Names**
Displays the names of the desk assignees in a pop-up window when the cursor is anywhere on a desk line.
Documents by Department

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.
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 department code to view deleted documents.

SubDept: 5 characters
Identify a sub-department code, if needed.

Form: 3 characters
Help
Specify the type of document to be displayed, if desired.

Finished: 1 character
Type ‘Y’ to include documents that have successfully completed the routing process.

**Screen Information**

Panel 1

Sel: 1 character
Type an ‘X’ to select a document.

Document ID: 12 characters/digits
Displays the document identification number 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 routing notes are attached to the document.

Creator: 14 characters
Displays the name of the person who submitted the document for Routing and Approval.

Doc Summary: 30 characters
Displays a summary description taken from the original document.
Screen 918 – Documents by Department (cont’d)

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.

Status: 15 characters
Identifies the status of the document:
- 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

Created: 8 digits
Displays the date the document was created and submitted to Routing and Approval.

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 PF 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 routing notes 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 updated and maintained by each campus.
The information is available to all TAMUS members and is not campus specific.

Screen 850 – FRS Person Information

<table>
<thead>
<tr>
<th>Screen 850 Person Information</th>
<th>01/23/09 15:34</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC 02</td>
<td>850 Person Information</td>
</tr>
<tr>
<td>Screen: ___ Person: 4uuuuuuuu2 Inactive: _ Delete: _ (Y/N)</td>
<td></td>
</tr>
<tr>
<td>Person’s Name: (Last) CARSON____ (First) COLLEEN ___ (MI) C (Suffix) ____ (Prefix) ____</td>
<td></td>
</tr>
<tr>
<td>SSN: 4ss-ss-sss4 Title Code: 8185 ANALYST</td>
<td></td>
</tr>
<tr>
<td>Phone: 979-458-9999 Date Hired: 07/08/2004 Gender: F</td>
<td></td>
</tr>
<tr>
<td>FAX: 979-458-8888 Adloc Part: 01 Acct: 271030 Suffix: _</td>
<td></td>
</tr>
<tr>
<td>BPP phone: 979-458-9898</td>
<td></td>
</tr>
<tr>
<td>Home CC Dept S-Dept Address: FAMIS SERVICES __________ Mail Cd: C1144</td>
<td></td>
</tr>
<tr>
<td>01 INFR FAMIS 200 TECHNOLOGY WAY #2180</td>
<td></td>
</tr>
<tr>
<td>— _________ City: COLLEGE STATION State: TX</td>
<td></td>
</tr>
<tr>
<td>_______ Zip: 778453424 Country: ___</td>
<td></td>
</tr>
<tr>
<td>Routing Email Prefs *** EPA</td>
<td></td>
</tr>
<tr>
<td>PI/Researcher: _ Email from BPP: N Notify Freq: _</td>
<td></td>
</tr>
<tr>
<td>Printer Default: ________________ Voided Apps: N N</td>
<td></td>
</tr>
<tr>
<td>Enter—PF1—PF2—PF3—PF4—PF5—PF6—PF7—PF8—PF9—PF10—PF11—PF12—</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHelp</td>
<td></td>
</tr>
</tbody>
</table>

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)

**Action Line**

◆ **Person:** Help 9 digits

Enter the person’s Universal Identification Number. You may also type an asterisk (*) to search for a name.
Screen 850 – Person Information (cont’d)

**Inactive:**
1 character
Type ‘Y’ to make the selected person inactive.

This field can only be set by security officers.

**Delete (Y/N):**
1 character
Type ‘Y’ to delete the person’s record from the person file.

**Screen Information**

**Person’s Name**

- **(Last):** 20 characters
  Identify the person’s last name.
- **(First):** 10 characters
  Enter the person’s first name.
- **(MI):** 1 character
  Include the person’s middle initial, if any.
- **(Suffix):** 4 characters
  Provide the suffix of the person, if any.
- **(Prefix):** 4 characters
  Enter the prefix of the person, if any.

**SSN:**
9 digits
Displays the Social Security number.

**Title Code:** Help 4 digits
Provides the person’s title code as provided by TAMUS.

**Phone:**
10 digits
Enter the phone number of the person.

**Date Hired:**
8 digits
Include the date the person began working for The Texas A&M University System.

**Gender:**
1 digit
Displays the gender of the person.

**FAX:**
10 digits
Provide the person’s FAX number, if desired.

**Adloc Part:** Help 2 digits
Enter the adloc (administrative location) for the person.

**Acct:**
6 digits
Identify the account number from which the person is paid.
### Screen 850 – Person File (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Suffix:</strong></td>
<td>1 character/digit&lt;br&gt;Enter a code, if needed, to further separate the Adloc.</td>
</tr>
<tr>
<td><strong>BPP phone:</strong></td>
<td>10 digits&lt;br&gt;Shows the phone number listed in BPP.</td>
</tr>
<tr>
<td><strong>Home CC:</strong></td>
<td>2 digits&lt;br&gt;Help&lt;br&gt;Include the home campus code of the person.</td>
</tr>
<tr>
<td><strong>Dept:</strong></td>
<td>5 digits&lt;br&gt;Show the department the person works in.</td>
</tr>
<tr>
<td><strong>Sub-Dept:</strong></td>
<td>5 digits&lt;br&gt;Enter the sub-department the person works in.</td>
</tr>
<tr>
<td><strong>Address:</strong></td>
<td>3 lines (30 characters/digits each)&lt;br&gt;Include the business address of the person.</td>
</tr>
<tr>
<td><strong>Mail Code:</strong></td>
<td>4 digits&lt;br&gt;Help&lt;br&gt;Enter the on campus mail code of the person.</td>
</tr>
<tr>
<td><strong>City:</strong></td>
<td>30 characters&lt;br&gt;Shows the city where the department is located.</td>
</tr>
<tr>
<td><strong>State:</strong></td>
<td>2 characters&lt;br&gt;Help&lt;br&gt;Displays state where department is located.</td>
</tr>
<tr>
<td><strong>Zip:</strong></td>
<td>9 digits&lt;br&gt;Provides the department’s zip code + 4 digits.</td>
</tr>
<tr>
<td><strong>Country:</strong></td>
<td>3 characters&lt;br&gt;Help&lt;br&gt;Include the country of the person.</td>
</tr>
<tr>
<td><strong>PI/Researcher:</strong></td>
<td>1 digit&lt;br&gt;Indicate if person is a researcher or principal investigator.</td>
</tr>
<tr>
<td><strong>E-mail from BPP:</strong></td>
<td>1 character&lt;br&gt;Indicate (‘Y’ or ‘N’) if email address was obtained from the BPP employees file.</td>
</tr>
<tr>
<td><strong>Inbox Notify</strong></td>
<td>1 character&lt;br&gt;Enter frequency of the person’s inbox notification.</td>
</tr>
<tr>
<td><strong>Frequency:</strong></td>
<td>D = Daily&lt;br&gt;E = Every Document&lt;br&gt;W = Weekly</td>
</tr>
<tr>
<td><strong>Type:</strong></td>
<td>1 character&lt;br&gt;Indicates email notification type:</td>
</tr>
<tr>
<td></td>
<td>A = Approvals Only&lt;br&gt;N = None (no email)&lt;br&gt;Y = All (include notifications)</td>
</tr>
</tbody>
</table>
Screen 850 – Person File (cont’d)

**E-Mail:**
30 characters
Identify the E-mail address of the person.

**Printer Default:**
30 characters
Enter the default printer to receive reports.

**Additional Functions**

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

- **School/College** – *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.

- **EPA Allow Flag** – 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.

- **Purchasing Trn Flag** – if not set to ‘Y’ on this screen, FAMIS does not recognize that routing of purchasing documents exists for the department.

- **Exec Level** – 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 maintained and updated by each campus.

The information is campus specific.

A department can’t be deleted, it can only be “expired” by entering the expiration.
Screen 860 – Department Table Maintenance (cont’d)

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, ?, * Field Help Available)

Action Line
◆ Department:  Help 5 characters
Enter a valid department code.
Sub Dept:  5 characters
Enter the sub-department, if needed.

Screen Information
Dept Name:  50 characters
Enter the full name of the department.
◆ 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>.
Alt APO ID:  9 digits
Enter the UIN of the alternate APO (accountable property officer).
Head/Director Phone:  10 digits
Indicate the phone number of the head/director of the department.
Alt APO Phone:  10 digits
Provide the phone number of the alternate APO.
Mail Code:  Help 5 characters/digits
Enter the mail code for the department.
Building Number:  5 digits
Identify the department’s building number.
Exec Level:  Help 2 character
Include the executive level of the department.
Building Campus:  2 digits
Identify the campus code for the building.
**Screen 860 – Department Table Maintenance (cont’d)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Division:</strong></td>
<td>2 characters, provide division code reflecting the structure of the campus.</td>
</tr>
<tr>
<td><strong>Room:</strong></td>
<td>6 digits, enter room number or the floor number of the department.</td>
</tr>
<tr>
<td><strong>School/College:</strong></td>
<td>2 characters, help, provide the level of organizational structure. This is the only screen where you can update this field.</td>
</tr>
<tr>
<td><strong>Group Cd:</strong></td>
<td>5 characters, include the group code for the department. Used for grouping departments together for special purposes, perhaps security or reporting.</td>
</tr>
<tr>
<td><strong>Off Campus Flag:</strong></td>
<td>1 character, enter ‘Y’ if the department is located off campus.</td>
</tr>
<tr>
<td><strong>Other Loc:</strong></td>
<td>20 characters, type ‘Y’ if the department is located in more than one location.</td>
</tr>
<tr>
<td><strong>Budget Sort Dept Nbr:</strong></td>
<td>4 characters, used for AL-RSCH budget sort number.</td>
</tr>
<tr>
<td><strong>Approx. Inv. Count:</strong></td>
<td>6 characters, enter the approximate inventory numbers.</td>
</tr>
<tr>
<td><strong>Allow Flags:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FRS:</strong></td>
<td>1 character, enter ‘Y’ to indicate this department is valid for accounting in FRS.</td>
</tr>
<tr>
<td><strong>EPA:</strong></td>
<td>1 character, enter ‘Y’ if the department is allowed to create EPA documents.</td>
</tr>
<tr>
<td><strong>DBR:</strong></td>
<td>1 character, type ‘Y’ if the department is allowed to create Departmental Budget Records.</td>
</tr>
<tr>
<td><strong>DCR:</strong></td>
<td>1 character, enter ‘Y’ to identify that the department is allowed to create Departmental Correction Requests.</td>
</tr>
<tr>
<td><strong>SciQuest:</strong></td>
<td>1 character, type ‘Y’ to identify this department is using the SciQuest application.</td>
</tr>
<tr>
<td><strong>FFX:</strong></td>
<td>1 character, enter ‘Y’ to indicate this department is valid for asset control in FFX.</td>
</tr>
<tr>
<td><strong>TDP:</strong></td>
<td>2 digits, enter ‘Y’ if the department is allowed to create TDP (asset transfer) documents.</td>
</tr>
</tbody>
</table>
### Screen 860 – Department Table Maintenance (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Purch Trn Flag:            | 1 character  
Type ‘Y’ to identify this department has been fully trained and is ready to use the Purchasing system. |
| FFX Cert Month:            | 2 digits  
Indicate the month for inventory certification for this department. |
| Surplus:                   | 1 character  
Enter ‘Y’ if this is an inventory surplus department for TDP routing. |
| Maestro Org Unit:          | 10 digits  
Identify the number of the organization unit (as determined by TEES). This is used to group departments together for reporting. |
| Parent Dept:               | 4 characters  
Enter a valid FAMIS department. 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 parent department for a department with a subdepartment and is not modifiable. |
| Center/Institute:          | 2 characters  
Used to determine if a department is a Center or Institute and to group departments together for reporting. Valid values are:  
Blank = Regular department  
CA = Center – Board Approved  
CG = Center – Grandfathered  
CN = Center – Not Board Approved  
IA = Institute – Board Approved  
IG = Institute – Grandfathered  
IN = Institute – Not Board Approved |
| Mail to Dept Head:         | 1 character  
Type ‘Y’ if the department head or director wants to receive a statement. |
| Other Part Nbr:            | 2 digits  
Include another campus code that owns part of the department inventory. |
| Other Part Dept:           | 5 characters  
Enter the department on another campus code that owns part of the department inventory. |
| Other Part Sub Dept:       | 5 characters  
Enter the other FAMIS member’s sub-department, if needed. |
| Dept Expiration Date:      | 8 characters  
Provide the date the department expires. |
| Dept Office:               | 10 characters  
Shows the office for Routing & Approvals that governs this department. |
Screen 860 – Department Table Maintenance (cont’d)

**Dept View:** 10 characters
Indicates the electronic view within the electronic office for Routing & Approvals that governs this department.

**Exec Office:** 10 characters
Shows the executive office for Routing & Approvals that governs this department.

**Exec View:** 10 characters
Shows the electronic view within the executive office for Routing & Approvals that governs this department.

**General Comments:** 1 character
‘Y’ indicates general comments have been entered.

**FFX Comments:** 1 character
Displays ‘Y’ if comments have been entered for Fixed Assets.

### Additional Functions

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

<table>
<thead>
<tr>
<th>PF7</th>
<th>Audit Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit</td>
<td>Displays the departmental table audit information.</td>
</tr>
</tbody>
</table>

| PF9 | Download |
| Dload | Download information from this screen using Entire Connection. |

| PF10 | General Comments |
| GenCm | View any general comments. |

| PF11 | Fixed Assets Comments |
| FFXCm | View any fixed assets comments. |
Section VI
Electronic Office
Quick Reference for Set Up
## Quick Reference Office Setup

### Office Level

<table>
<thead>
<tr>
<th>Create Office</th>
<th>Type in: Name for the Office Description, Manager UIN, Delegates UIN, Default Signer UIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen 940</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add Units</th>
<th>Type in: Dept and SubDept Office Name Executive Office Name (if required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen 941</td>
<td></td>
</tr>
</tbody>
</table>
## Department Level

<table>
<thead>
<tr>
<th><strong>Create View</strong></th>
<th>Office Name &amp; Name for the View</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add Units</strong></td>
<td>Function – Add (A), Update (U), Delete (D)</td>
</tr>
<tr>
<td><strong>Screen 920</strong></td>
<td>Description, Dept &amp; SubDept</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Creator Desk</strong></th>
<th>Office Name &amp; View Name &amp; Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add People</strong></td>
<td>Description</td>
</tr>
<tr>
<td><strong>Screen 924</strong></td>
<td>Function – Add (A), Update (U), Delete (D)</td>
</tr>
<tr>
<td><strong>UIN</strong></td>
<td>Type – blank or Substitute (S)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Approver Desks</strong></th>
<th>Office Name &amp; View Name &amp; Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add People</strong></td>
<td>Description</td>
</tr>
<tr>
<td><strong>Screen 922 (opt)</strong></td>
<td>Function – Add (A), Update (U), Delete (D)</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Type – blank or Substitute (S)</td>
</tr>
<tr>
<td><strong>UIN</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Signer Desk</strong></th>
<th>Office Name &amp; View Name &amp; Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add People</strong></td>
<td>Description</td>
</tr>
<tr>
<td><strong>Screen 923</strong></td>
<td>Function – Add (A), Update (U), Delete (D)</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Type – blank or Substitute (S)</td>
</tr>
<tr>
<td><strong>UIN</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Update Path</strong></th>
<th>Office Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create New Paths</strong></td>
<td>Description</td>
</tr>
<tr>
<td><strong>Screen 921</strong></td>
<td>Function – Add (A), Update (U), Delete (D)</td>
</tr>
<tr>
<td><strong>Form, Dept/SubDept</strong></td>
<td>Category, Desk(s)</td>
</tr>
</tbody>
</table>
## Executive Level

| **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) |
### Quick Reference Office Setup (cont’d)

#### Processing Level

<table>
<thead>
<tr>
<th><strong>Create View</strong></th>
<th><strong>Create New Paths</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Screen 940</strong></td>
<td><strong>Screen 926</strong></td>
</tr>
<tr>
<td><strong>Processing Desks</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Add People</strong></td>
<td><strong>Create New Paths</strong></td>
</tr>
<tr>
<td><strong>Screen 922</strong></td>
<td><strong>Screen 926</strong></td>
</tr>
</tbody>
</table>

**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)
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.

**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.

- **Office Manager** – 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.

- **Default Signer** - 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 office which will control routing and approving of documents for units assigned to it.

**Screen Information**
- **Description:**
  - 43 characters
  - Enter a description of the electronic office.

- **Manager (UIN):**
  - Help 9 digits
  - Identify the **office manager**. 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 name of the **delegates** for the office.

- **Default Signer (UIN):**
  - Help 9 digits
  - Identify the personal identification number and name of the **person** who is to be assigned to all signer desks in the office.

- **Comments:**
  - 3 lines (43 characters each)
  - Available for free form entry of **comments** regarding the office.
Screen 940 – Office Create/Modify (cont’d)

**Executive View**

*See Executive Routing*

Y/N: 1 character

Indicate whether or not ('Y' or 'N') this office has higher level responsibilities and approve documents at this higher level.

View Name: Help 10 characters

Identify the department having executive responsibilities.

**Processing View**

*See Processing Routing*

Y/N: 1 character

Indicate whether or not ('Y' or 'N') this office has responsibilities to “process” documents. These may be departments like Purchasing Services/Fiscal Office.

View Name: Help 10 characters

Identify the department having executive responsibilities.

**Additional Functions**

PF KEYS

See the Appendix for explanations of the standard PF Keys.

PF7 Audit

Audit

Displays the audit trail information of who created and modified the selected document.

```
<table>
<thead>
<tr>
<th>**** Audit Information ****</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office: PURCHASING</td>
</tr>
<tr>
<td>Date Created: 09/26/1994</td>
</tr>
<tr>
<td>Added By: KxxxxL  LINDSEY, LAUREN</td>
</tr>
<tr>
<td>Last Modify Date: 11/14/2001</td>
</tr>
<tr>
<td>Last Modify By: KxxxxW  WALLER, WANDA W</td>
</tr>
<tr>
<td>PF4=Exit</td>
</tr>
</tbody>
</table>
```

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: _____
Dept Name: BIOLOGY
Dept head: PARKER, PAULETTE P
Office: BIOL    Manager: CARLSON, COLLEEN C
View: BIOLVIEW
Exec Office: VPSCI__________
Exec View: VPSCI
```

**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 920. Update will subsequently be allowed on Screen 941.

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

**Action Line**

◆ Dept:
5 characters
Indicate the department to link to a particular office. This is the primary department for each fiscal account.

◆ SubDept:
5 characters
Identify the subdepartment to link to a particular office.

**Screen Information**

Dept Name:
10 characters
Displays the department name matching the code entered on the Action Line.

Dept head:
20 characters
Shows the name of the department head for the department.

◆ Office:
10 characters
Identify the office to which the department is linked.

Manager:
20 characters
Displays the name of the office manager for the office to which the department is linked.

View:
10 characters
Displays the view within the departmental office this unit belongs to.

Exec Office:
10 characters
Shows the executive office name to which the department reports if it has been linked to an executive office.
Screen 941 – Units to Office Assignment (cont’d)

**Exec View:**

4 characters
Shows the word “EXEC” if the department/subdepartment is assigned to an executive office.

**Additional Functions**

**PF KEYS**
See the Appendix for explanations of the standard PF Keys.
Create Your Department Level Structure

Step 1:
Screen 920
Create Department View

Step 2:
Screen 924
Creator Desk
Change default UINs to Creators' UINs

Step 3:
Screen 922
If necessary, create Approver Desk and attach people

Step 4:
Screen 923
Modify Signer Desk
Add names of all signers

Step 5:
Screen 921
If necessary, add Approver Desks to department path
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.

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)

Action Line
◆ Office: 10 characters
Identify the title of the electronic office for which you wish to create a view.

◆ View: 10 characters
Indicate the name of the view you wish to create or modify (Minimum of 6 characters required).

Screen Information
Description: 43 characters
Describes the view within the office.

Manager: 30 characters
Displays the name of the office manager.

◆ Func: 1 character
Indicate the desired function: Add or Delete a department/subdepartment, or Position a department/subdepartment at the top of the list.
Screen 920 – Department View Create/Modify (cont’d)

- **Dept:** 5 characters
  Enter the **code for the department.** *Note:* The department must exist on FAMIS department table (Screen 860).

- **Sub-Dept:** 5 characters
  Include the **code for the subdepartment.** *Note:* 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.

**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.

"Blank" is the default “form” for this field.
Screen 924 – Creator Desk Modify (cont’d)

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

Action Line
◆ Office:  Help 10 characters
Indicate the title of the office which governs the creator desk.
◆ View:  Help 10 characters
Identify the view which governs the creator desk.
Form:  Help 3 characters
Identify the type of documents 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 delete the desk.

Screen Information
◆ Func:  Help 1 character
Identify the desired function: Add or Delete an assignee, Position a particular person at the top of the list, or Update an assignee.
◆ Type:  Help 1 character
Indicate if the person is a primary approver (blank) or substitute approver (‘S’) on the desk.
◆ UIN:  Help 9 digits
Identify the personal Universal Identification Numbers (UIN) for the people assigned to the desk.
Name:  32 characters
Shows the name associated with the UIN.

Additional Functions
PF KEYS
See the Appendix for explanations of the standard 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 one assignee.**

Screen 922 - Approver Desk Create/Modify

<table>
<thead>
<tr>
<th>Func Type</th>
<th>UIN</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5uuuuuuu1</td>
<td>YALE, YOLANDA Y</td>
</tr>
<tr>
<td></td>
<td>7uuuuuuu4</td>
<td>LANE, LINDA L</td>
</tr>
</tbody>
</table>

Number of Assignees: 2

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)

**Action Line**
◆ **Office:** 10 characters
  Indicate the title of the office to which the desk will belong.

◆ **Desk:** 10 characters
  Identify the approval desk that is to be created/modified.

Delete Desk: 1 character
  Type ‘Y’ to delete a desk.

**Screen Information**
◆ **Description:** 43 characters
  Enter a description of the desk that is being created/modified.

Number of Assignees: 3 digits
  Indicate the number of people that are attached to the desk. **The desk must have at least one assignee.**

◆ **Func:** 1 character
  Identify the desired function: **Add**, **Delete**, **Update** an assignee, or **Position** a particular person at the top of the list.
Screen 922 – Approver Desk Create/Modify (cont’d)

◆ Type:  
Help 1 character  
Indicate if the person is a primary approver (blank) or substitute approver ('S') on the desk.

◆ UIN:  
Help 9 digits  
Identify the Universal Identification Numbers (UIN) for the people assigned to the desk.

Name:  
32 characters  
Displays the name associated with the UIN.

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**

<table>
<thead>
<tr>
<th>Screen: ___</th>
<th>Office: PURCHASING</th>
<th>View: PURCHASING</th>
<th>Form: ___</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Mgr : YALE, YOLANDA Y</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desk : SIGNER DSK (Default)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Func Type UIN Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---- ---- ---------</td>
<td>------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>_ S 5uuuuuuu8 LANE, LORENA L</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_ 8uuuuuuu0 JOEL, JENNIFER J</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_ 8uuuuuuu7 STILES, SARAH S</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_ _ _ _ _ _</td>
<td></td>
<td></td>
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<td>_______</td>
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<td></td>
</tr>
<tr>
<td>_______</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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 and 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)

**Action Line**

◆ **Office:**

Indicate the title of the office to be displayed.

◆ **View:**

Identifies the name of the view to be displayed.

◆ **Form:**

Identify the type of documents that will be routed through a particular path. For example, requisitions will only route through the path with the form=PRQ.

◆ **Delete Desk:**

Type ‘Y’ to delete the desk. You can only delete a specific form.

**Screen Information**

**Description:**

Enter a description of the office/view combination.

**Office Mgr:**

Displays the name of the office manager for the office/view.

**Desk:**

Identifies all of the defined signer desks for that view.

◆ **Func:**

Identify the desired function: Add, Delete, Update an assignee, or Position a particular person at the top of the list.

◆ **Type:**

Indicate if the person is a primary approver (blank) or substitute approver (‘S’) on the desk.

◆ **UIN:**

Identify the Universal Identification Numbers (UIN) for the people assigned to the desk.
**Screen 923 – Signer Desk Modify (cont’d)**

| Name: | 32 characters  
| Displays the name associated with the UIN. |

**Additional Functions**

**PF KEYS**  
See the Appendix for explanations of the standard PF Keys.
Department Level Paths

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.

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)

**Action Line**

◆ **Office:** 10 characters
  Indicate the title of the office which governs the routing.

◆ **View:** 10 characters
  Identify the view governing the routing paths.

**Screen Information**

**Path Information**

◆ **Description:** 43 characters
  Describe the view to create or modify.

◆ **Office Mgr:** 30 characters
  Displays the name of the office manager.

◆ **FN:** Help 1 character
  Indicate the desired function: Add, Update, or Delete a path, or Position a particular path at the top of the list.

◆ **Form:** Help 3 characters
  Identify the type of documents that will be routed through a particular path. For example, requisitions will only route through the path with the form=PRQ.
Screen 921 – Department Paths Create/Modify (cont’d)

♦ Dept/Sub: 10 characters
   Indicate the department/subdepartment combination from which documents will be routed for a particular path.

Category: Help 10 characters/digits
   Accepts dollar amount criteria defining which documents should route through a particular path. For approval of documents equal to or greater than a particular dollar amount, a separate path can be created.

Status and Desks: 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
   Displays the names of the desk assignees in a pop-up window when the cursor is on a desk name.

+--------------------------------------------------------------+
|                                                              |
|  DESK: SIGNER DSK                                           |
|                                                              |
|      UIN       STATUS      NAME                              |
|                                                              |
|    5uuuuuuu8     S      LANE, LORENA L                      |
|    8uuuuuuu0            JOEL, JENNIFER J                     |
|    8uuuuuuu7     S      STILES, SARAH S                      |
|                                                              |
|                                                              |
|                                                              |
|                                                              |
|    *** END OF LIST - 3 WORKERS FOUND                         |
|                                                  PF4 to Quit |
|                                                              |
+--------------------------------------------------------------+
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

![Screen 940 – Office Create/Modify (with ‘Y’ in Executive View)](image)

Add Executive Level to Units

![Screen 941 – Unit to Office Assignment](image)

This is done for each of the dept / subdept combinations that participate with this executive level office.
Executive Level Detail (cont’d)

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

### Screen 860 – Department Table Maintenance

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen:</td>
<td>___</td>
</tr>
<tr>
<td>Department:</td>
<td>VPBAS</td>
</tr>
<tr>
<td>Sub Dept:</td>
<td>_____</td>
</tr>
<tr>
<td>Dept Name:</td>
<td>VICE PRS FOR BUS ADMIN – STUD SERVICES</td>
</tr>
<tr>
<td>Head/Director ID:</td>
<td>_______</td>
</tr>
<tr>
<td>Alt APO ID:</td>
<td>_______</td>
</tr>
<tr>
<td>Head/Director Phone:</td>
<td>__________</td>
</tr>
<tr>
<td>Alt APO Phone:</td>
<td>___________________________</td>
</tr>
<tr>
<td>Exec Level:</td>
<td>SS</td>
</tr>
<tr>
<td>Building Campus:</td>
<td>___</td>
</tr>
<tr>
<td>Division:</td>
<td>EM</td>
</tr>
<tr>
<td>Room:</td>
<td>___</td>
</tr>
<tr>
<td>School/College:</td>
<td>___</td>
</tr>
<tr>
<td>Group Cd:</td>
<td>___</td>
</tr>
<tr>
<td>Off Campus Flag:</td>
<td>N</td>
</tr>
<tr>
<td>Other Loc:</td>
<td>___</td>
</tr>
<tr>
<td>Budget Sort Dept Nbr:</td>
<td>___</td>
</tr>
<tr>
<td>Approx. Inv. Count:</td>
<td>___</td>
</tr>
<tr>
<td>FRS Allow Flag:</td>
<td>Y</td>
</tr>
<tr>
<td>DBR Allow:</td>
<td>_</td>
</tr>
<tr>
<td>FFX Allow Flag:</td>
<td>Y</td>
</tr>
<tr>
<td>FFX Cert. Month:</td>
<td>___</td>
</tr>
<tr>
<td>Purch Trn Flag:</td>
<td>_</td>
</tr>
<tr>
<td>EPA Allow:</td>
<td>_</td>
</tr>
<tr>
<td>FFX Cert. Month:</td>
<td>___</td>
</tr>
<tr>
<td>Other Part Nbr:</td>
<td>___</td>
</tr>
<tr>
<td>Mail to Dept Head:</td>
<td>___</td>
</tr>
<tr>
<td>Other Part Dept:</td>
<td>___</td>
</tr>
<tr>
<td>Other Part Sub Dept:</td>
<td>___</td>
</tr>
<tr>
<td>Dept Office:</td>
<td>VFFIN</td>
</tr>
<tr>
<td>Dept View:</td>
<td>VFINANCE1</td>
</tr>
<tr>
<td>Exec Office:</td>
<td>VPFIN</td>
</tr>
<tr>
<td>Exec View:</td>
<td>EXEC</td>
</tr>
<tr>
<td>Dept Expiration Date:</td>
<td>__________</td>
</tr>
<tr>
<td>General Comments:</td>
<td>N</td>
</tr>
</tbody>
</table>

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

### Create Approver Desks for Executive Level

#### Screen 922 – Approver Desk Create/Modify

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen:</td>
<td>___</td>
</tr>
<tr>
<td>Office:</td>
<td>VPFIN</td>
</tr>
<tr>
<td>Desk:</td>
<td>EXEC-DSK1</td>
</tr>
<tr>
<td>Delete Desk:</td>
<td>N</td>
</tr>
<tr>
<td>Description:</td>
<td>EXECUTIVE DSK 1 FOR VP FINANCE</td>
</tr>
<tr>
<td>Number of Assignees:</td>
<td>2</td>
</tr>
<tr>
<td>Func Type</td>
<td>UIN</td>
</tr>
<tr>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>_    _</td>
<td>8uuuuuuu2</td>
</tr>
<tr>
<td>_    _</td>
<td>6uuuuuuu1</td>
</tr>
</tbody>
</table>

****** End of list ******

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.

Screen 925 - Executive Paths Create/Modify

<table>
<thead>
<tr>
<th>Office</th>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTSCEAN</td>
<td>PROVOST</td>
<td>Exec view</td>
</tr>
<tr>
<td>ARTSCEAN</td>
<td>GRAD-DEAN</td>
<td>Exec view</td>
</tr>
</tbody>
</table>

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)

**Action Line**

- **Office**: 10 characters
  
  Enter the title of the office governing the routing.

- **View**: 10 characters
  
  Identify the view governing the routing paths.

**Screen Information**

**Path Information**

- **Description**: 40 characters
  
  Enter a description of the executive view.
Executive Level Detail (cont’d)

Office Mgr: 20 characters
Displays the name of the office manager.

FN: 1 character
Identify the desired function: Add, Update, or Delete a path, or Position a path at the top of the screen.

Form: 3 characters
Indicate the type of documents that will be routed through the path. An asterisk (*) may be used as a wildcard.

Dept: 5 characters
Include the department from which documents will be routed through the path. An asterisk (*) may be used as a wildcard.

Category: 10 digits
For approval of documents 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: 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
Displays the names of the desk assignees in a pop-up window when the cursor is placed on a desk name.
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

**Screen 940 – Office Create/Modify (with ‘Y’ in Processing View)**

<table>
<thead>
<tr>
<th>940 Office Create/Modify</th>
<th>06/06/07 16:23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Office: PURCHASING</td>
<td></td>
</tr>
<tr>
<td>Description: PURCHASING SERVICES</td>
<td></td>
</tr>
<tr>
<td>Manager (UIN): 5uuuuuuu1 YALE, YOLANDA Y</td>
<td></td>
</tr>
<tr>
<td>Delegates (UIN): 7uuuuuuu4 LOMAS, LINDA L</td>
<td></td>
</tr>
<tr>
<td>Default Signer (UIN): 5uuuuuuu8 LANE, LEONA L</td>
<td></td>
</tr>
<tr>
<td>Comments: __________________________</td>
<td></td>
</tr>
<tr>
<td>Y/N View Name</td>
<td></td>
</tr>
<tr>
<td>Executive View: _ Processing View: Y PURS (Must be unique with the Campus code)</td>
<td></td>
</tr>
<tr>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHelp AUDIT</td>
<td></td>
</tr>
</tbody>
</table>

Create Approver Desks for Processing Paths

**Screen 922 – Approver Desk Create/Modify**

<table>
<thead>
<tr>
<th>922 Approver Desk Create/Modify</th>
<th>06/06/07 16:27</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Office: PURCHASING Desk: CENTRALDESK Delete Desk: N</td>
<td></td>
</tr>
<tr>
<td>Description: CENTRAL PROCESSING DESK</td>
<td></td>
</tr>
<tr>
<td>Number of Assignees: 7</td>
<td></td>
</tr>
<tr>
<td>Func Type UIN Name</td>
<td></td>
</tr>
<tr>
<td>----- ---- --------- ------------------------------</td>
<td></td>
</tr>
<tr>
<td>_ 7uuuuuuu8 ENGLISH, ELISA E</td>
<td></td>
</tr>
<tr>
<td>_ S 9uuuuuuu8 KARL, KENDRA K</td>
<td></td>
</tr>
<tr>
<td>_ S 3uuuuuuu4 CARVER, CHARLES C</td>
<td></td>
</tr>
<tr>
<td>_ S 4uuuuuuu3 POEHL, POLLY P</td>
<td></td>
</tr>
<tr>
<td>_ S 5uuuuuuu9 DREW, DONALD D</td>
<td></td>
</tr>
<tr>
<td>_ S 5uuuuuuu1 YALE, YOLANDA Y</td>
<td></td>
</tr>
<tr>
<td>_ S 7uuuuuuu4 LOMAS, LINDA L</td>
<td></td>
</tr>
<tr>
<td>_ _ _</td>
<td></td>
</tr>
<tr>
<td>_ _ _</td>
<td></td>
</tr>
<tr>
<td>***** End of list *****</td>
<td></td>
</tr>
<tr>
<td>Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---</td>
<td></td>
</tr>
<tr>
<td>Hmenu Help EHelp p</td>
<td></td>
</tr>
</tbody>
</table>
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. Refer to Essentials Section for further details.

Screen 926 - Processing Paths Create/Modify

<table>
<thead>
<tr>
<th>Form</th>
<th>Path</th>
<th>Category</th>
<th>Status and Desks</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| *   | CENTRLDESK |          |                  |
| *   | ADMIN      | ADMIN-C1 |                  |
| *   | ADMIN-1    | ADMIN-C1 | ADMIN            |
| *   | ADMIN-2    | ADMIN-C2 | ADMIN-B2         |
| *   | ADMIN-3    | ADMIN-C3 | ADMIN-B3         |

*** Press <ENTER> to view more entries ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---

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.

Refer to Essentials Section for further details 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.

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

**Action Line**
◆ **Office:**
  10 characters
  Indicate the title of the office which governs the routing.

◆ **View:**
  10 characters
  Displays the view within the departmental office this unit belongs to.

**Screen Information**

◆ **Description:**
  40 characters
  Enter a description of the executive view.

◆ **Office Mgr:**
  20 characters
  Displays the name of the office manager.

◆ **FN:**
  1 character
  Identify the desired function: **Add** a new path, **Update** an existing path, **Delete** an existing path, or **Position** a path at the top of the screen.

◆ **Form:**
  3 characters
  Enter the type of documents to be routed through the path. An ‘*’ may be used as a wildcard.

◆ **Path:**
  10 characters/digits
  Include which path documents will be routed to from a central desk via the ‘FYP’ action.

◆ **Category:**
  10 characters/digits
  For approval of documents 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)

**Status and Desks:**

<table>
<thead>
<tr>
<th>Help 1 character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicate how the document should go to the desk and to what desk.</td>
</tr>
<tr>
<td>Blank = Approval</td>
</tr>
<tr>
<td>I = Information</td>
</tr>
<tr>
<td>N = Notification</td>
</tr>
</tbody>
</table>

**Additional Functions**

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

**PF7**

**Names of Desk Assignees**
Displays the **names of the desk assignees** in a pop-up window when the cursor is placed on a desk name.

<table>
<thead>
<tr>
<th>DESK: ADMIN-C1</th>
</tr>
</thead>
<tbody>
<tr>
<td>UIN</td>
</tr>
<tr>
<td>7uuuuuu4</td>
</tr>
<tr>
<td>5uuuuuu1</td>
</tr>
<tr>
<td>7uuuuuu8</td>
</tr>
</tbody>
</table>

*** END OF LIST - 3 WORKERS FOUND  
PP4 to Quit **
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 an Office with Dept Level

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delete Desks</strong></td>
<td>Delete all desks on all paths except the default path by ‘U’ in Function and space out the desk name</td>
</tr>
<tr>
<td>Screen 921</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Paths</strong></td>
<td>Delete all paths except the default path by ‘D’ in the Function</td>
</tr>
<tr>
<td>Screen 921</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Creator Desk</strong></td>
<td>Delete all Creator Desks for all Forms except the default Form (blank) by ‘Y’ in Delete Desk Field</td>
</tr>
<tr>
<td>Screen 924</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Approver Desks</strong></td>
<td>Delete all Approver Desks for that Office by ‘Y’ in Delete Desk Field.</td>
</tr>
<tr>
<td>Screen 922</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Signer Desk</strong></td>
<td>Delete all signer Desks for all Forms except the default (blank) by ‘Y’ in Delete Desk Field</td>
</tr>
<tr>
<td>Screen 923</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Units in View(s)</strong></td>
<td>Delete all Dept/SubDept from the View(s) by ‘D’ in the Function field</td>
</tr>
<tr>
<td>Screen 920</td>
<td></td>
</tr>
<tr>
<td><strong>Delete the View(s)</strong></td>
<td>Delete the View(s) by keying in the View name</td>
</tr>
<tr>
<td>Screen 928</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Exec Level from Unit</strong></td>
<td>Delete the Exec Level from Unit(s) by spacing out the Exec Office name</td>
</tr>
<tr>
<td>Screen 941</td>
<td></td>
</tr>
<tr>
<td><strong>Delete Office from Unit</strong></td>
<td>Delete the Office from Unit(s) by spacing out the Office name</td>
</tr>
<tr>
<td>Screen 941</td>
<td></td>
</tr>
<tr>
<td><strong>Delete the Office</strong></td>
<td>Delete the Office by entering ‘Y’ to Delete</td>
</tr>
<tr>
<td>Screen 944</td>
<td></td>
</tr>
</tbody>
</table>
Department View Delete

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.

### Screen 928 - Department View Delete

<table>
<thead>
<tr>
<th>928 Dept View Delete</th>
<th>06/06/07 17:11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Office: PURCHASING</td>
<td></td>
</tr>
<tr>
<td>Delete Views:</td>
<td>Messages</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---

Hmenu Help  EHelp

### 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.
Screen 928 – Department View Delete (cont’d)

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

**Action Line**
◆ Office: 10 characters
   Indicate the office from which the view is to be deleted.

**View Information**
◆ Delete Views: 10 characters each
   Identify the departmental view(s) to be deleted.

Messages: 30 characters
   Displays messages that indicate whether the delete process was successful or not.

**Additional Functions**
PF KEYS
   See the Appendix for explanations of the standard PF Keys.
Delete an Electronic Office

Deleting an electronic office can be an 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.

**Screen 944 - Office Delete**

<table>
<thead>
<tr>
<th>Description: PURCHASING SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager (UIN): 5uuuuuuu1 YALE, YOLANDA Y</td>
</tr>
<tr>
<td>Delegates (UIN): 7uuuuuuu4 LANE, LEONA L</td>
</tr>
<tr>
<td>Default Signer (UIN): 5uuuuuuu8 LEHR, LINDA L</td>
</tr>
</tbody>
</table>

**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)

**Action Line**
- ◆ Office: 10 characters
  Indicate the office to be deleted.
- ◆ Enter 'Y' to Delete: 1 character
  Enter whether or not ('Y' or blank) you wish to delete the office.

**Screen Information**
- Description: 40 characters
  Displays text describing the office.
Manager (UIN): 9 digits/20 characters
Indicates the Universal Identification Number (UIN) and name of the office manager.

Delegates (UIN): 9 digits/20 characters
Displays the Universal Identification Number (UIN) and name of the delegates for the office manager.

Default Signer (UIN): 9 digits/20 characters
Displays the default Universal Identification Number (UIN) which must be on all signer desks for this office.

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

**Screen 242 – Limited Purchase Close**

<table>
<thead>
<tr>
<th>242 Limited Purchase Close</th>
<th>06/06/07 11:18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___</td>
<td>Doc: A711277</td>
</tr>
<tr>
<td>FY 2007</td>
<td>CC 02</td>
</tr>
<tr>
<td>Close Document: Y</td>
<td></td>
</tr>
</tbody>
</table>

---

Doc Summary: BUFFY’S CATERING. REFRESHMENTS
Doc Year: 2007 | Doc Date: 02/15/2007 | Cat: LP | State: |
Dept: CHEN | Sub Dept: | Total Amt: 1148.75 |
Vendor: 1vvvvvvvvv4 M & Z BAR-B-QUE DBA*BUFFY’S CA | LD T Cd: |
Reimburse Id: | FOB: |
User Ref: 500388-0058 | All Items Received: Y |
Date Received: 02/16/2007 |

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help EHelp Next Item Route Recap 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.

**Screen 242 – Pop Up Window to Route Document**

| Type ‘Y’ to submit to Routing & Approval: |
| Additional Routing (FYI/FYA) |

Type ‘FYI’ or ‘FYA’ if you want to route the document to someone “outside” the normal path.
Screen 242 – Limited Purchase Close (cont’d)

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

Screen 256 – Requisition Document Close

<table>
<thead>
<tr>
<th>Document</th>
<th>05/25/2007</th>
<th>Cat: RO</th>
<th>User Ref: 2vvvvvvv3</th>
<th>St Req:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Contact Person: WINNE WILSON</td>
<td>Ph: 979-888-7777</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End</td>
<td>Buyer: SSB BARNES, BRETT</td>
<td>Ph: 979-844-2222</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required: Research (Y/N): N</td>
<td>Type Funds: L Type Order: HIED</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change</td>
<td>No. 00</td>
<td>Last Print Date:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Doc Summary: SUN EQUIPMENT MAINTENANCE (MARCHBANKS-P700397)

Total Amount: 93,208.00 Untransferred Total: 93,208.00

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help  EHelp       Next  Item  Route                         Warns

Exempt Purchase documents are closed and routed on Screen 237.

Screen 237 – Exempt Purchase Close

Screen 237 – Exempt Purchase Close

<table>
<thead>
<tr>
<th>Document</th>
<th>06/06/07 15:18</th>
<th>Date: 06/06/07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___ Doc: E703487</td>
<td>In Process</td>
<td></td>
</tr>
</tbody>
</table>

Doc Summary: FALL TUITION

Doc Year: 2007 Doc Date: 09/01/2006 Cat: EP State:

Dept: ANSC Sub Dept: Total Amt: 10925.39

Vendor: 3vvvvvvv1U TEXAS A&M UNIVERSITY LDT Cd:

Reimburse Id: 510100-7934 All Items Received: Y

User Ref: All Items Received: Date Received: 10/06/2006

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help  EHelp       Next  Item  Route Recal                         Warns
Security Officers Signer Desk

This screen is set up solely for use by Security Officers 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. You must be authorized to sign. 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.

### Screen 943 - Security Signer Desk Modify

<table>
<thead>
<tr>
<th>Office Mgr</th>
<th>Desk</th>
<th>Func Type</th>
<th>UIN</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>YALE, YOLANDA Y</td>
<td>SIGNER DSK (Default)</td>
<td>S</td>
<td>5uuuuuuu8</td>
<td>LANE, LINDA L</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S</td>
<td>8uuuuuuu0</td>
<td>JOEL, JOHNNY J</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S</td>
<td>8uuuuuuu7</td>
<td>STILES, SARAH S</td>
</tr>
</tbody>
</table>

***** End of list *****

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---

### 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.
Screen 943 – Security Signer Desk Modify (cont’d)

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)

**Action Line**

◆ **Office:** 10 characters
  Indicate the title of the office governing a set of signer desks.

◆ **View:** 10 characters
  Enter the view governing the set of signer desks.

**Form:** 3 characters
  Identify the type of documents 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 delete the desk.

**Screen Information**

**Description:** 40 characters
  Enter a description for the office listed.

**Office Mgr:** 30 characters
  Shows the name of the electronic office manager for the office.

**Desk:** 30 characters
  Shows the name of the desk in conjunction with the Office: field.

◆ **Func:** 1 character
  Identify the desired function: **Add** an assignee, **Delete** an assignee, **Position** a particular person at the top of the list, or **Update** an assignee.

◆ **Type:** 1 character
  Indicate if the person is a primary approver (blank) or substitute approver (‘S’) on the desk.

◆ **UIN:** 9 digits
  Identify the Universal Identification Numbers (UIN) for the people assigned to the desk.

**Name:** 32 characters
  Displays the name associated with the UIN.

**Additional Functions**

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

<table>
<thead>
<tr>
<th>930 Desk Copy</th>
<th>06/06/07 17:07</th>
<th>CC 02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___  Office: PURCHASING  Desk: ADMIN-B2___</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy to Desk -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name: ADMIN-B3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description: ADMINISTRATIVE BUYER 3 __________________</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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)

**Action Line**

- **Office:** 10 characters
  Indicate the title of the office to be copied.

- **Desk:** 10 characters
  Identify the desk to copy.

**Screen Information**

- **Copy to Desk:** 1 character
  Type ‘Y’ to copy.
Screen 930 – Desk Copy (cont’d)

Desk Information

- **Name:** 10 characters
  Indicate the name of the desk you would like to create.

- **Description:** 43 characters
  Enter a description of the new desk.

Additional Functions

**PF KEYS**

See the Appendix for explanations of the standard PF Keys.
## Add SubDepartment to Routing Structure

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create SubDept</strong>&lt;br&gt;Screen 860</td>
<td>If the SubDept does not already exist on the Department Table, you must create it so it is valid.</td>
</tr>
<tr>
<td><strong>Add New Unit to Office</strong>&lt;br&gt;Screen 941</td>
<td>The new Unit (Department/SubDepartment combination) must be added to the Office and Exec Level, if required.</td>
</tr>
<tr>
<td><strong>Add New Unit to View</strong>&lt;br&gt;Screen 920</td>
<td>Add the New Unit to the Department View to which it belongs.</td>
</tr>
<tr>
<td><strong>Create Desks</strong>&lt;br&gt;Screen 922</td>
<td>Create any new desks that are needed for the SubDept routing.</td>
</tr>
<tr>
<td><strong>Add Path(s)</strong>&lt;br&gt;<strong>Add Desks to Paths</strong>&lt;br&gt;Screen 921</td>
<td>Add a new path using the Unit and add the desks for that path.</td>
</tr>
</tbody>
</table>
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 FAMIS Services.
The information is campus specific.

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

Screen 950 - Electronic Documents Profile

<table>
<thead>
<tr>
<th>Func</th>
<th>Form</th>
<th>Description</th>
<th>Review by</th>
<th>Processing</th>
<th>Required</th>
<th>Panel:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DBR</td>
<td>DEPT BUD REQ</td>
<td>Y</td>
<td>DBR OFFICE</td>
<td>SIGNER</td>
<td>AM</td>
</tr>
<tr>
<td></td>
<td>EBR</td>
<td>BUDGET EPA</td>
<td>Y</td>
<td>PAYROLL</td>
<td>SIGNER</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>EGR</td>
<td>GRAD EPA</td>
<td>Y</td>
<td>PAYROLL</td>
<td>SIGNER</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>EWR</td>
<td>WAGE EPA</td>
<td>Y</td>
<td>PAYROLL</td>
<td>SIGNER</td>
<td>D</td>
</tr>
<tr>
<td></td>
<td>PBD</td>
<td>BID</td>
<td>Y</td>
<td>PURS</td>
<td>NONE</td>
<td>P</td>
</tr>
<tr>
<td></td>
<td>PEP</td>
<td>EXEMPT PURCH</td>
<td>N</td>
<td>PURS</td>
<td>SIGNER</td>
<td>AM</td>
</tr>
<tr>
<td></td>
<td>FIP</td>
<td>INVOICE PROB</td>
<td>N</td>
<td>PURS</td>
<td>SIGNER</td>
<td>AM</td>
</tr>
<tr>
<td></td>
<td>PLP</td>
<td>LIMITED PRCH</td>
<td>N</td>
<td>PURS</td>
<td>SIGNER</td>
<td>AM</td>
</tr>
<tr>
<td></td>
<td>PPO</td>
<td>PURCH. ORDER</td>
<td>Y</td>
<td>PURS</td>
<td>NONE</td>
<td>P</td>
</tr>
<tr>
<td></td>
<td>PRQ</td>
<td>REQUISITION</td>
<td>Y</td>
<td>PURS</td>
<td>SIGNER</td>
<td>AM</td>
</tr>
</tbody>
</table>

*** End of list ***

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.
Screen 950 – Electronic Documents Profile (cont’d)

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

**Action Line**
Form: 3 characters
Indicate the document type to be displayed at the beginning.

**Screen Information**
Panel 1
Func: 1 character
FAMIS Services Entry
Identify the desired function: Add a new profile, Update an existing profile,
Delete an existing profile, or Position 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
Proc Unit: 1 character
FAMIS Services Entry
Indicate whether or not (‘Y’ or ‘N’) review by a processing unit is required.

Processing Unit View: 10 characters
FAMIS Services Entry
Identify the unit that must process these forms, if review is required.

Required Approvals: 10 characters
FAMIS Services Entry
Indicate the type and number of approvals needed for the form type.

Cat: 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: 1 character
FAMIS Services Entry
Indicate whether routing begins at the Processing or Departmental office level.

Exp Dt: 10 characters
FAMIS Services Entry
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
Office: 10 characters
Identify the office to which the department is linked.
Screen 950 – Electronic Documents Profile (cont’d)

- **View:**
  - 10 characters
  - Displays the view within the departmental office this unit belongs to.

**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)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRQSAR000009</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/18/2000</td>
<td>SA</td>
<td></td>
</tr>
<tr>
<td>PRQSAR000024</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/03/2003</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR100001</td>
<td>2001</td>
<td>JENSEN, JULIE J</td>
<td>11/21/2000</td>
<td>04/03/2003</td>
<td>SA</td>
<td></td>
</tr>
</tbody>
</table>

**Type 'Y' to view only documents for approval.**

### Screen 910 - Document Inbox (Panel 2)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRQSAR000009</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/18/2000</td>
<td>SA</td>
<td></td>
</tr>
<tr>
<td>PRQSAR000024</td>
<td>2000</td>
<td>JENSEN, JULIE J</td>
<td>03/27/2000</td>
<td>04/03/2003</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRQSAR100001</td>
<td>2001</td>
<td>JENSEN, JULIE J</td>
<td>11/21/2000</td>
<td>04/03/2003</td>
<td>SA</td>
<td></td>
</tr>
</tbody>
</table>

**Type 'Y' to view only documents for approval.**
Screen 910 – Document Inbox (cont’d)

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 Screen 911, 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 approve the document and press <ENTER>.
- If you are rejecting 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)

**Action Line**
- **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 title of the electronic office 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 display only 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 routing notes are attached to the document.

Doc Summary: 40 characters/digits
Displays a summary description of the document.

Requested Action: 11 characters
Shows the requested action that needs to be taken on the document.

Status: 14 characters
Identifies status of the document’s progress through 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

Panel 2
FY: 4 digits
Indicates the fiscal year that the document was created.

Submitted by: 21 characters
Shows the name of the person who submitted the document for routing and approval.

Submitted: 8 digits
Identifies the date the document was submitted for routing and approval.

Arrived: 8 digits
Shows the date the document arrived at the Inbox.

Current
CC: 2 digits
Indicates the current location of the document by TAMUS member campus code.

Unit: 10 characters
Identifies the current department/sub-department in which the document is being routed.

Panel 3
Current
Office: 10 characters
Displays the current office the document is being routed through.
Screen 910 – Document Inbox (cont’d)

**Desk:**
10 characters
Indicate the current desk/UIN the document is awaiting action from.

**View:**
10 characters
Displays the name of the view where a person has approval authority on a 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 Discd**
Discards the selected document(s) from the In-Box.

**PF7 RHist**
Routing History
Displays the routing history of the document and shows who has seen it.

**PF8 Sel**
Select
Displays the Routing Document Information pop-up window for the document(s) you have selected.

**PF9 All**
Select All Documents
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.

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

Action Line

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

Doc ID: 12 characters/digits
Displays the document identification number 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 characters
Indicates document’s progress through the Routing & 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

**Requested Action:** 12 characters
Displays the requested action that needs to be taken on the routed document.

**Doc. Summary:** 40 characters
Displays a summary description taken from the original document.

**Released:** 8 digits
Identifies the date the document was released to Routing & Approval system.

**by:** 25 characters
Shows the name of the person routing the documents.

**(Type of Document):** 7 characters/digits
Displays the type of document and indicates the identification number (i.e., “Limited Purch” and document number.)

**Contact Person:** 25 characters
Identifies the name of the person to contact about the document.

**Dept Name:** 25 characters
Name of first department listed on the purchasing document header.

**Doc Total:** 15 digits
Shows total dollar amount on the purchasing document before any transfers are processed.

**Untransferred Total:** 15 digits
Identifies the total dollar amount on purchasing document that has not been transferred 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
Used to exit the Cover Sheet pop-up window and return to Screen 910.

**NDoc**
Used to view the next document selected.
### Screen 910 – Document Inbox (cont’d)

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

Screen 911 - Document Inbox by Name (Panel 1)
**Screen 911 - Document In-Box by Name (Panel 2)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>FY</th>
<th>Submitted by</th>
<th>Submitted</th>
<th>Arrived</th>
<th>CC</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td></td>
<td>LAWRENCE, LINDA L</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLPSAL400089</td>
<td>2004</td>
<td>LAWRENCE, LINDA L</td>
<td>09/21/2004</td>
<td>06/23/2008</td>
<td>SA</td>
<td></td>
</tr>
<tr>
<td>PROQA400022</td>
<td>2004</td>
<td>LAWRENCE, LINDA L</td>
<td>09/21/2004</td>
<td>06/24/2005</td>
<td>SA</td>
<td></td>
</tr>
<tr>
<td>PLPSAL400090</td>
<td>2004</td>
<td>LAWRENCE, LINDA L</td>
<td>09/21/2004</td>
<td>06/23/2008</td>
<td>SA</td>
<td></td>
</tr>
</tbody>
</table>

*** End of List 6 Document(S) Found ***

**Screen 911 - Document In-Box by Name (Panel 3)**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Office</th>
<th>Desk</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>PAYROLLWS</td>
<td>BUDGET-1</td>
<td>PAYROLL</td>
</tr>
<tr>
<td>EBRSA0001911</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLPSAL400089</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROQA400022</td>
<td>PURCHASING</td>
<td>CENTRALDSK PURS</td>
<td></td>
</tr>
<tr>
<td>PLPSAL400090</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EWRSA0001915</td>
<td>PAYROLLWS</td>
<td>BUDGET-1</td>
<td>PAYROLL</td>
</tr>
<tr>
<td>EBRSA0001917</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*** End of List 6 Document(S) Found ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help EHelp Discd RHist Sel All Left Right

Place cursor on an item in the “Current Desk” column and press PF7 to view routing history.
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.

  **-OR-**

- 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 approve the document and press <ENTER>.
- If you are rejecting 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**

\(\text{◆} = \text{Required} / \text{Help} = \text{PF2, ? or * Field Help Available}\)

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 911 – Cover Sheet Window**

The Action Field does not display unless you have authority to “take an action” for that document.
Screen 911 – Document Inbox by Name (cont’d)

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

Action Line
Action: 3 characters
Enter the action 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 document identification number used in Routing & Approval; consists of Form (3 characters), Campus Code (2 digits), Document Number (7 character/digits).

Status: 14 characters
Indicates status of document’s progress through 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

Requested Action: 12 characters
Displays the requested action that needs to be done with the routed document.

Doc. Summary: 40 characters
Shows a summary description taken from the original document.

Released: 8 digits
Identifies the date the document was released to routing.

by: 25 characters
Shows the name of the person routing the documents.

(Type of Document): 7 character/digits
Displays the type of document and indicates the identification number (i.e., “Limited Purch” and document number.)

Contact Person: 25 characters
Identifies the name of the person to contact about the document.
Screen 911 – Document Inbox by Name (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Name:</td>
<td>25 characters</td>
</tr>
<tr>
<td></td>
<td>Name of first department listed on the purchasing document header.</td>
</tr>
<tr>
<td>Doc Total:</td>
<td>15 digits</td>
</tr>
<tr>
<td></td>
<td>Indicates the total dollar amount on the purchasing document before any</td>
</tr>
<tr>
<td></td>
<td>transfers are processed.</td>
</tr>
<tr>
<td>Untransferred</td>
<td>15 digits</td>
</tr>
<tr>
<td>Total:</td>
<td>Identifies the total dollar amount on purchasing document that has not been</td>
</tr>
<tr>
<td></td>
<td>transferred to another document.</td>
</tr>
</tbody>
</table>

**Additional Functions 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 next document selected.

- **PF6** Document Summary
  - Summ View the document summary information.

- **PF7** Routing History
  - RHist Displays the routing history 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 notes to view: Document Notes or Routing Notes. Type “X” to select and press <ENTER> to view notes.

- **PF10** Document Header Extended Information
  - Headr Displays the document header extended information for the document.

- **PF11** Line Items
  - Items Shows information about the line items on the document.

- **PF12** Document Tracking
  - Track Identifies the actions taken on the document.
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 include finished documents; type ‘N’ to exclude them.

### Screen 912 - Document Outbox (Panel 1)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>N</th>
<th>Doc Summary</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td></td>
<td>PLPAML400006 * CANDY FOR HALLOWEEN</td>
<td>Final</td>
<td>Discarded</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPAML400008 * COFFEE</td>
<td>Rejected</td>
<td>Submitted</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPAML400006 * CANDY FOR HALLOWEEN</td>
<td>Final</td>
<td>Submitted</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PBDAMB000003 FURNITURE FOR BUYERS</td>
<td>Cancelled</td>
<td>Cancelled/Cncl</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPSAL000030 LEATHER CHAIR</td>
<td>Cancelled</td>
<td>Discard/Cncl</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPAML000305 * OFFICE FURNITURE</td>
<td>Cancelled</td>
<td>Discard/Cncl</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPSAL000022 NET DIALOG</td>
<td>Final(CO)</td>
<td>Deleted</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PBDAMB000003 BID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPSAL000030 LIMITED PURC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PLPAML000305 LIMITED PRCH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PRQSAR100004 RENTAL OF XEROX COPIER 1090 FOR 9/</td>
<td>In Proc Rt</td>
<td>Approved</td>
</tr>
<tr>
<td>_</td>
<td></td>
<td>PRQSAR100006 COMPUTER MONITOR FOR JULIE JONES</td>
<td>In Proc Rt</td>
<td>Approved</td>
</tr>
</tbody>
</table>

*** End of List 10 Document(S) Found ***

### Screen 912 - Document Outbox (Panel 2)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Action Date/Time</th>
<th>Form Name</th>
<th>FY</th>
<th>Submitted by</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>06/07/2007 11:19</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>11/13/2006 15:01</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>11/13/2006 14:57</td>
<td>LIMITED PRCH</td>
<td>2004</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>03/04/2004 14:53</td>
<td>BID</td>
<td>2000</td>
<td>YEATS, YOLANDA Y</td>
</tr>
<tr>
<td>_</td>
<td>01/13/2004 17:04</td>
<td>LIMITED PURC</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>12/15/2003 14:11</td>
<td>LIMITED PRCH</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>07/13/2001 00:00</td>
<td>LIMITED PURC</td>
<td>2000</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>12/08/2000 14:11</td>
<td>LIMITED PRCH</td>
<td>2001</td>
<td>CARSON, CARLA C</td>
</tr>
<tr>
<td>_</td>
<td>11/21/2000 15:52</td>
<td>REQUISITION</td>
<td>2001</td>
<td>CARSON, CARLA C</td>
</tr>
</tbody>
</table>

*** End of List 10 Document(S) Found ***
Screen 912 – Document Outbox (cont’d)

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 routing document number to be positioned on the first line of the display.

Include Finished: 1 character
Indicate whether or not (‘Y’ or ‘N’) to include finished documents that have completed routing.
Screen 912 – Document Outbox (cont’d)

| **Actions From:** | 8 digits  
The default is one month back, but this can be changed to view documents within a specified date range. |
| **Thru:** | 8 digits  
The default is one month back, but this can be changed to limit the date range when displaying documents. |

**Screen Information**

**Panel 1**

| **Sel:** | 1 character  
Type ‘X’ to select documents one at a time. |
| **Document ID:** | 12 characters/digits  
Shows the document identification number 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 routing notes are attached to the document. |
| **Doc Summary:** | 34 characters  
Displays a summary description 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 last action taken on the document in the routing process. |

**Panel 2**

| **Action Date/Time:** | 12 digits  
Identifies the date and time document was sent to the Outbox. |
| **Form Name:** | 12 characters  
Indicates the document form name: requisition, purchase order, limited purchase order, bid, or exempt purchase order. |
| **FY:** | 4 digits  
Shows the fiscal year for the document. |
Screen 912 – Document Outbox (cont’d)

Submitted by: 21 characters
Displays the name of the person who submits the document for approval.

Panel 3
Submitted: 8 digits
Identifies the date the document was submitted for approval.

Finished: 1 character
‘Y’ indicates whether the document has finished the routing process.

Additional Functions

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

PF5 Recall Document
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.

PF7 Routing History
Used to display the routing history of the document. See Screen 914. Auto approves are designated by “(A)”.

PF8 Select
After selecting document(s), displays the Purchasing Document Cover Sheet.

PF9 Routing 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 include finished documents; type ‘N’ to exclude 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)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Action Date</th>
<th>Form Name</th>
<th>FY</th>
<th>Submitted by</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLP02Z911213</td>
<td>08/24/2009</td>
<td>FREIGHT</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>PLP02Z91124</td>
<td>08/24/2009</td>
<td>TRANSFER OVERREALIZED INCOME</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>PLP02Z911106 * PROPERTY REFUND</td>
<td>Final</td>
<td>Approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DDB02907188</td>
<td>08/19/2009</td>
<td>transfer of fund balance</td>
<td>Final</td>
<td>Discarded</td>
</tr>
<tr>
<td>EWR020478035</td>
<td>08/19/2009</td>
<td>EWR: Karl Koonze - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR020478018</td>
<td>08/19/2009</td>
<td>EWR: Darryl Donaldson - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR020478006</td>
<td>08/19/2009</td>
<td>EWR: Erin Edwards - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR020477994</td>
<td>08/19/2009</td>
<td>EWR: Anna Andrews - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR020477986</td>
<td>08/19/2009</td>
<td>EWR: Janice Jefferson - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR020477964</td>
<td>08/19/2009</td>
<td>EWR: Roland Richter - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
<tr>
<td>EWR0204778037</td>
<td>08/19/2009</td>
<td>EWR: Joan Jewel - Wage Position</td>
<td>Final</td>
<td>Approved</td>
</tr>
</tbody>
</table>

*** Press ENTER To View More Documents ***

Screen 913 - Document Outbox by Name (Panel 2)

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>Action Date</th>
<th>Form Name</th>
<th>FY</th>
<th>Submitted by</th>
</tr>
</thead>
<tbody>
<tr>
<td>EWR020467243</td>
<td>08/24/2009</td>
<td>WAGE EPA</td>
<td>2009</td>
<td>RHINE, RHONDA R</td>
</tr>
<tr>
<td>EWR020467271</td>
<td>08/24/2009</td>
<td>WAGE EPA</td>
<td>2009</td>
<td>RHINE, RHONDA R</td>
</tr>
<tr>
<td>PLP02Z908080</td>
<td>08/19/2009</td>
<td>LIMITED PRCH</td>
<td>2009</td>
<td>WOODS, WYNONA W</td>
</tr>
<tr>
<td>PLP02Z908095</td>
<td>08/19/2009</td>
<td>LIMITED PRCH</td>
<td>2009</td>
<td>WOODS, WYNONA W</td>
</tr>
<tr>
<td>PLP02Z908104</td>
<td>08/19/2009</td>
<td>LIMITED PRCH</td>
<td>2009</td>
<td>WOODS, WYNONA W</td>
</tr>
<tr>
<td>PLP02Z908112</td>
<td>08/19/2009</td>
<td>LIMITED PRCH</td>
<td>2009</td>
<td>WOODS, WYNONA W</td>
</tr>
<tr>
<td>PLP02Z908126</td>
<td>08/19/2009</td>
<td>LIMITED PRCH</td>
<td>2009</td>
<td>WOODS, WYNONA W</td>
</tr>
<tr>
<td>EBR0204666740</td>
<td>08/18/2009</td>
<td>BUDGET EPA</td>
<td>2010</td>
<td>LINDSEY, LEONA L</td>
</tr>
</tbody>
</table>

*** End of List 58 Document(S) Found ***
Screen 913 – Document Outbox by Name (cont’d)

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

PF Keys
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)

Action Line

◆ Name:
20 characters
Enter the name of the person whose Outbox is to be displayed.

Document:
12 characters/digits
Enter the routing document number to be positioned on the first line of the display.
Screen 913 – Document Outbox by Name (cont’d)

Actions From: 8 digits
The default is one month prior to the current date. You may change this date to view documents within a specified date range.

Thru: 8 digits
Displays the current date but you may change it to limit the date range for displaying documents.

Include Finished: 1 character
‘Y’ in this field includes documents that have successfully completed the routing process; ‘N’ excludes finished documents.

Screen Information
Panel 1
Sel: 1 character
Type an ‘X’ to select and press <ENTER> to view the Document Cover Sheet.

Document ID: 12 characters/digits
Displays the document identification number 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 routing notes attached to the document.

Doc Summary: 40 characters
Displays a summary description 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 last action taken on the document in the routing process.

Panel 2
Action Date/Time: 12 digits
Identifies the date and time action was taken on the document.
Screen 913 – Document Outbox by Name (cont’d)

Form Name: 12 characters
Displays the type of purchasing document displayed.

FY: 4 digits
Indicates the fiscal year of the document.

Submitted by: 21 characters
Identifies the name of the person who submitted the document to the Routing and Approval system.

Panel 3
Submitted: 8 digits
Shows the date the document was submitted for approval.

Finished: 1 character
Indicates whether the document has finished the routing process.

Additional Functions
PF KEYS
See the Appendix for explanation of the standard PF Keys.

PF5 Recall
Recalls the document back to your In-Box.

PF7 Routing History
Used to display the routing history of the document. This is also available on Screen 914. Auto approves are designated by “(A)”.

PF8 Select
After selecting document(s), displays the Purchasing Document Cover Sheet.

PF9 Notes
Used to display routing notes for the selected document.
### User Approval Profile

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

<table>
<thead>
<tr>
<th>Campus Cd</th>
<th>Office</th>
<th>Desk</th>
<th>Status</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>P-LPAPP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>S-LPAPP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>P-REQAPP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>S-REQAPP</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>P-LPINFO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>S-LPINFO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>P-REQINFO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>S-REQINFO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>SIGNER DSK</td>
<td>PURS/WRHS</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>CREATE DSK</td>
<td>PURS/WRHS</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>SIGNER PLP</td>
<td>PURS/WRHS</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>SIGNER PRQ</td>
<td>PURS/WRHS</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>SIGNER DSK S</td>
<td>PURCHASING</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>PURCHASING</td>
<td>CREATE DSK</td>
<td>PURCHASING</td>
<td></td>
</tr>
</tbody>
</table>

More Entries - Press <ENTER> to continue

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu 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 person whose approval profile you want displayed. 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 campus code 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 characters
  Displays the title of the office in which the person has approval authority.
Screen 915 – Approval Profile by Name (cont’d)

<table>
<thead>
<tr>
<th>Desk:</th>
<th>10 characters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identifies the name of the desk where the person has approval authority.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status:</th>
<th>1 character</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help</td>
<td>Indicate how the document should go to the desk.</td>
</tr>
<tr>
<td>Blank</td>
<td>Approval</td>
</tr>
<tr>
<td>I</td>
<td>Information</td>
</tr>
<tr>
<td>N</td>
<td>Notification</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View:</th>
<th>10 characters</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Displays the name of the view where a person has approval authority on a signer or creator desk. This is only applicable to signer/creator desks.</td>
</tr>
</tbody>
</table>

**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**

<table>
<thead>
<tr>
<th>Ln</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The following people have seen this document:</td>
</tr>
<tr>
<td>2</td>
<td>Submitted 11/16/10 13:27 WATSON, WANDA W (979-862-6667)</td>
</tr>
<tr>
<td>3</td>
<td>This document is currently in CC 02 office MAIL</td>
</tr>
<tr>
<td>4</td>
<td>on desk APPROVER - Arrival Date: 11/16/2010 13:27</td>
</tr>
<tr>
<td>5</td>
<td>Desk workers are:</td>
</tr>
<tr>
<td>6</td>
<td>LING, LONA L (979-845-5555)</td>
</tr>
<tr>
<td>7</td>
<td>MATHEWS, MELINDA M (sub) (979-845-6666)</td>
</tr>
<tr>
<td>8</td>
<td>COOK, CASEY C (sub) (979-862-3333)</td>
</tr>
<tr>
<td>9</td>
<td>******************* POTENTIAL ROUTING PATH *******************</td>
</tr>
<tr>
<td>10</td>
<td>OFFICE: 02-MAIL DESK: SIGNER DSK DEPT/SUB DEPT: MAIL</td>
</tr>
</tbody>
</table>

**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)

Action Line
Document: 12 characters/digits
Identify the document number to be displayed. The document ID consists of Form + Campus Code + Document Number.

Position at Line: 2 digits
Indicate the line number to be displayed at the top of the screen.

Screen Information
Ln: 2 digits
Displays sequential line numbers to identify historical actions.

Description: 70 characters/digits
Describes the routing history of the document, 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
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 names of 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
+--------------------------------------------------------------+
### PIPs

#### 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:

- the invoice line item amount is different from the amount on your document
- 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.

---

**Screen 910 - Document Inbox**

<table>
<thead>
<tr>
<th>Sel</th>
<th>Document ID</th>
<th>Doc Summary</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PRQSAR000013</td>
<td>COPIER RENTAL FOR 4-1-00 THROUGH 8-</td>
<td>FYA/Approve</td>
<td>FYA/FRA Rt</td>
</tr>
<tr>
<td>2</td>
<td>PLPSAL000030</td>
<td>LEATHER CHAIR</td>
<td>Notify</td>
<td>Recalled</td>
</tr>
<tr>
<td>3</td>
<td>PIPAMI000001</td>
<td>PARALLEL 10'</td>
<td>Notify</td>
<td>Recalled</td>
</tr>
<tr>
<td>4</td>
<td>PRQSAR000009</td>
<td>FURNITURE FOR MY OFFICE</td>
<td>Notify</td>
<td>Final</td>
</tr>
<tr>
<td>5</td>
<td>PRQSAR000019</td>
<td>RENTAL OF A XEROX 1090</td>
<td>Notify</td>
<td>Recalled</td>
</tr>
<tr>
<td>6</td>
<td>PRQSAR000024</td>
<td>FURNITURE FOR MY OFFICE</td>
<td>Notify</td>
<td>In Proc Rt</td>
</tr>
<tr>
<td>7</td>
<td>PLPSAL000006</td>
<td>OFFICE FURNITURE</td>
<td>Notify</td>
<td>Recalled</td>
</tr>
<tr>
<td>8</td>
<td>PLPSAL000075</td>
<td>MANHOGANY DESK</td>
<td>Notify</td>
<td>Recalled</td>
</tr>
<tr>
<td>9</td>
<td>PRQSAR100001</td>
<td>COMPUTER MONITOR FOR JULIE WILSON</td>
<td>Notify</td>
<td>Rejected</td>
</tr>
</tbody>
</table>

*** END OF LIST 9 DOCUMENT(S) FOUND ***

---
PIPs (cont’d)

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

```
Screen: ___ **** Invoice Problem Cover Sheet ***** 06/06/07 17:44
Action: ___
Doc ID: PIPABI700009  Status: FYA/FRA Rt
Doc Summary: TEST Requested Action: FRA/Approve
Released by: 08/06/1997 by: KILEY, KYLE K

Limited Purch : L520166  Invoice : INV999MARK
PO Doc Creator: KILEY, KYLE K  Voucher :
User Ref : 6uuuuuu1  Vchr Stat:
Dept Name : MIS PROJECT TEST

-- Press PF6 for more PIP information --
```

Press PF6 to view additional PIP information.

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**

```
************** Document Summary **************
PIP: I110126  Number of Desc Lines: 5  Page: 1_ Of 4

NOTES: DELLA, PLEASE PROVIDE A "6" ACCOUNT NUMBER FROM WHICH THE $0.99 TAX CAN BE PAID. SALES TAX CANNOT BE REIMBURSED ON ACCOUNT NUMBER 271030. YOU DO NOT HAVE TO MODIFY THE VOUCHER JUST NOTIFICATION VIA EMAIL IS SUFFICIENT. THANKS, MELISSA
```

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.
PIPs (cont’d)

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.

**For Your Information**
There is another type of PIP that can be sent to your Inbox. These are **FYI** (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 **DIS** to discard the information copy of the document.
Use Screen 292 to view information about a PIP when you know the PIP number.

**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)

**Action Line**

- **PIP:**
  
  Enter a valid PIP number.

**Screen Information**

- **Sel:**
  
  Type ‘X’ and press PF6 to select a PIP and display the PIP information.

- **PIP Number:**
  
  Displays the PIP number.

- **Type:**
  
  Shows the type of PIP. Valid values are:
  
<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FYA</td>
<td>For your approval</td>
</tr>
<tr>
<td>FYI</td>
<td>For your information</td>
</tr>
<tr>
<td>FRA</td>
<td>For return approval</td>
</tr>
</tbody>
</table>
Screen 292 – PIP Document Browse (cont’d)

For Document: 7 character/digits
Indicates the document number that has a problem or has been corrected.

Invoice Number: 14 digits
Shows the invoice number that is associated with the original document and the PIP document.

Rt. Cd: 2 characters
Identifies 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 date the document was last modified.

Modify Time: 4 digits
Shows the time the document was last modified.

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
Shows invoice problem in detail.

<table>
<thead>
<tr>
<th>Doc: L000078</th>
<th>Invoice Problem</th>
<th>1000002</th>
<th>Type: I</th>
<th>Inv: L000078</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created By:</td>
<td></td>
<td>on 09/06/1999</td>
<td>0 more PIPs</td>
<td>Page: 1</td>
</tr>
<tr>
<td>Code</td>
<td><em>------------------</em></td>
<td>Code Translation</td>
<td><em>------------------</em></td>
<td></td>
</tr>
<tr>
<td>__</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>----------------------</em></td>
<td>Comments</td>
<td><em>----------------------</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I WILL NEED A TAX WITH HOLDING FORM FOR THE MEALS, $64.86. __</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>YOU CAN FAX IT TO ME AT 5-9999. THANK YOU. __________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>____________________________________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>____________________________________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>____________________________________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>____________________________________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PF4=Exit</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PIP Browse by Purchasing Document

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.

**Screen 293– PIP Browse By Purch Document**

<table>
<thead>
<tr>
<th>Doc Sel</th>
<th>PIP Number</th>
<th>Type</th>
<th>Invoice Number</th>
<th>Rt</th>
<th>Modify Cd</th>
<th>Modify Date</th>
<th>Modify Time</th>
<th>By User</th>
</tr>
</thead>
<tbody>
<tr>
<td>A000541</td>
<td>1003974</td>
<td>FYI</td>
<td>A000541</td>
<td>FN</td>
<td>01/25/00</td>
<td>08:59</td>
<td>WxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000552</td>
<td>1003965</td>
<td>FYI</td>
<td>A000552</td>
<td>FN</td>
<td>01/24/00</td>
<td>14:58</td>
<td>GxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000558</td>
<td>1003975</td>
<td>FYI</td>
<td>A000558</td>
<td>FN</td>
<td>01/25/00</td>
<td>09:05</td>
<td>WxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000563</td>
<td>1003915</td>
<td>FYI</td>
<td>33248</td>
<td>FN</td>
<td>01/21/00</td>
<td>10:36</td>
<td>MxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000587</td>
<td>1003980</td>
<td>FYI</td>
<td>IN 308204</td>
<td>FN</td>
<td>01/25/00</td>
<td>12:35</td>
<td>KxxxxxT</td>
<td></td>
</tr>
<tr>
<td>A000639</td>
<td>1004323</td>
<td>FYI</td>
<td>100426</td>
<td>FN</td>
<td>02/08/00</td>
<td>15:44</td>
<td>AxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000660</td>
<td>1004355</td>
<td>FYI</td>
<td>92623415</td>
<td>FN</td>
<td>02/09/00</td>
<td>13:11</td>
<td>KxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000702</td>
<td>1004396</td>
<td>FYA</td>
<td>92617522</td>
<td>FN</td>
<td>02/11/00</td>
<td>09:36</td>
<td>KxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000705</td>
<td>1004232</td>
<td>FYI</td>
<td>2019276</td>
<td>FN</td>
<td>02/04/00</td>
<td>10:58</td>
<td>WxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000707</td>
<td>1003983</td>
<td>FYI</td>
<td>03428913</td>
<td>FN</td>
<td>01/25/00</td>
<td>13:07</td>
<td>PxxxxxP</td>
<td></td>
</tr>
<tr>
<td>A000746</td>
<td>1004015</td>
<td>FYA</td>
<td>54108</td>
<td></td>
<td>01/26/00</td>
<td>15:51</td>
<td>KxxxxxT</td>
<td></td>
</tr>
</tbody>
</table>

More records – Press ENTER to scroll

Enter–PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

**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)

**Action Line**

◆ Doc: 7 character/digits
Enter a valid purchasing document number.

**Screen Information**

◆ Sel: 1 character
Place the cursor in this field and press PF6 to select a document number and view PIP detail information.

Doc Number: 7 character/digits
Displays the document number.

PIP Number: 7 character/digits
Displays the PIP number.

Type: 3 characters
Shows the type of PIP. Valid values are:
FYA = For your approval
FYI = For your information
FRA = For return approval

Invoice Number: 14 characters/digits
Indicates the invoice number that is associated with the document.

Rt Cd: 2 characters
Shows 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
Indicates the date the document was last modified.

Modify Time: 4 digits
Shows the time the document was last modified.
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
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
PIP Document Browse by Invoice

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

<table>
<thead>
<tr>
<th>Sel</th>
<th>Invoice Number</th>
<th>Doc Number</th>
<th>PIP Number</th>
<th>Rt</th>
<th>Modify</th>
<th>Modify</th>
<th>By User</th>
</tr>
</thead>
<tbody>
<tr>
<td>_</td>
<td>L728689</td>
<td>L728689</td>
<td>I705440</td>
<td>FYI</td>
<td>FN</td>
<td>12/20/06</td>
<td>NxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A407329</td>
<td>A407329</td>
<td>I406635</td>
<td>FYI</td>
<td>CN</td>
<td>02/27/04</td>
<td>WxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A617624</td>
<td>A617624</td>
<td>I609438</td>
<td>FYI</td>
<td>FN</td>
<td>04/12/06</td>
<td>BxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A617624</td>
<td>A617624</td>
<td>I609492</td>
<td>FYI</td>
<td>FN</td>
<td>04/13/06</td>
<td>BxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A617640</td>
<td>A617640</td>
<td>I609497</td>
<td>FYI</td>
<td>FN</td>
<td>04/13/06</td>
<td>BxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A633476</td>
<td>A633476</td>
<td>I611677</td>
<td>FYI</td>
<td>CN</td>
<td>06/01/06</td>
<td>DxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A633476</td>
<td>A633476</td>
<td>I611678</td>
<td>FYI</td>
<td>FN</td>
<td>06/01/06</td>
<td>DxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A633532</td>
<td>A633532</td>
<td>I612480</td>
<td>FYA</td>
<td>FN</td>
<td>06/19/06</td>
<td>JxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>A710199</td>
<td>A710199</td>
<td>I709470</td>
<td>FYI</td>
<td>FN</td>
<td>03/23/07</td>
<td>CxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>C06-117118</td>
<td>L709327</td>
<td>I710934</td>
<td>FYA</td>
<td>FN</td>
<td>04/18/07</td>
<td>DxxxxxP</td>
</tr>
<tr>
<td>_</td>
<td>D742662</td>
<td>L509715</td>
<td>I502683</td>
<td>FYI</td>
<td>FN</td>
<td>10/20/04</td>
<td>GxxxxxP</td>
</tr>
</tbody>
</table>

Basic Steps

- 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)

Action Line

Invoice: ✔ 14 characters/digits
Enter a valid invoice number.

Screen Information

◆ Sel: 1 character
Type ‘X’ and press PF6 to select an invoice number 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 PIP number.
### Screen 294 – PIP Browse by Invoice (cont’d)

**Type:** 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 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 the date the document was last modified.

**Modify Time:** 4 digits  
Shows the time the document was last modified.

**By User:** 7 characters/digits  
Identifies the user ID and name who took action.

### Additional Functions

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

**PF6 View**  
Displays the invoice problem in detail.

```plaintext
<table>
<thead>
<tr>
<th>Doc: A514461</th>
<th>Invoice Problem I509508</th>
<th>Type: I</th>
<th>Inv: 030105</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created By:</td>
<td></td>
<td>on 04/04/2005</td>
<td>0 more PIPs</td>
</tr>
<tr>
<td>Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1#</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 845-9888 or email ir@vpfn.tamu.edu. This has been corrected for you this time.

*----------------------* Code Translation *----------------------*  
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
|                     |                          |                     |
```

*I WILL CORRECT THIS TO PROCESS, BUT THE DOC NUMBER SHOULD ALWAYS BE USED AS THE INVOICE NUMBER ON INDIVIDUAL REIMBURSEMENTS. THANKS. JANICE JORDAN 455-5555*
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 Program Function. 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  will appear. You cannot enter additional information until the system is finished processing. If any other symbols appear, press your RESET key -- often the ESCAPE key on a PC.
Appendix – Instructions (cont’d)

**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 must 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.
Appendix – Instructions (cont’d)

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.

| F6537 Please enter a valid six digit GL account |
| 002 GL 6 Digit                                |
| 01/20/92 11:26                               |

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**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>032365</td>
</tr>
<tr>
<td>Account Title</td>
<td>NAVSO, INC.</td>
</tr>
<tr>
<td>Resp Person</td>
<td>DOE, JANE</td>
</tr>
<tr>
<td>Old Acct</td>
<td>____________</td>
</tr>
<tr>
<td>Year-end Process</td>
<td>F</td>
</tr>
<tr>
<td>Reclassify</td>
<td>___</td>
</tr>
<tr>
<td>Reporting Group</td>
<td>___</td>
</tr>
<tr>
<td>Fund Group</td>
<td>FG</td>
</tr>
<tr>
<td>Sub Fund Group</td>
<td>DF</td>
</tr>
<tr>
<td>Sub-Sub</td>
<td>GP</td>
</tr>
<tr>
<td>Default Bank</td>
<td>00001</td>
</tr>
<tr>
<td>Override</td>
<td>Y</td>
</tr>
<tr>
<td>SL Mapped Count</td>
<td>___</td>
</tr>
<tr>
<td>Alternate Banks</td>
<td>00002</td>
</tr>
</tbody>
</table>

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

**DESCRIPTION:** DESIGNATES DEPARTMENTS WITHIN SCHOOLS OR UNITS FOR WHICH FISCAL REPORTS WILL BE NECESSARY, I.E. CHEMISTRY DEPARTMENT, ADMINISTRATION AND COUNSELOR EDUCATION.

<table>
<thead>
<tr>
<th>Lookup Value / . Menu</th>
<th>Rule : IASYS-DEPT</th>
<th>Default value is:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field: FG-DEPT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Appendix – Instructions (cont’d)
Appendix – Instructions (cont’d)

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**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen: ___</td>
<td>032365___</td>
</tr>
<tr>
<td>Account: 032365</td>
<td>NAVSO, INC.</td>
</tr>
<tr>
<td>Account Title: NAVSO, INC.</td>
<td></td>
</tr>
<tr>
<td>Resp Person: 9uuuuuu9 DOE, JANE</td>
<td></td>
</tr>
<tr>
<td>Old Acct: _____________</td>
<td></td>
</tr>
<tr>
<td>Year-end Process: F</td>
<td></td>
</tr>
<tr>
<td>Reporting Group: ___</td>
<td></td>
</tr>
<tr>
<td>Fund Group: FG</td>
<td></td>
</tr>
<tr>
<td>Sub Fund Group: DF</td>
<td></td>
</tr>
<tr>
<td>Sub-Sub: GP</td>
<td></td>
</tr>
<tr>
<td>Default Bank: 00001</td>
<td>Override: Y</td>
</tr>
<tr>
<td>SL Mapped Count:</td>
<td></td>
</tr>
<tr>
<td>Alternate Banks: 00002</td>
<td></td>
</tr>
<tr>
<td>Dept S-Dept Exec Div Coll Mail Cd Stmt</td>
<td>Primary: ELEN_ EPI_ FA AD EN C3128 Y</td>
</tr>
<tr>
<td>Secondary: ____ ____ ____ ____ ____</td>
<td></td>
</tr>
<tr>
<td>Long Title: NAVSO, INC. ENDOWMENT</td>
<td></td>
</tr>
<tr>
<td>Setup Date: 02/28/94__ ___________</td>
<td></td>
</tr>
</tbody>
</table>

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---

Hmenu Help WErrs Thelp Copy Paste EErrs Deflt Exit
<table>
<thead>
<tr>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>M90</td>
<td>Routing and Approval Menu</td>
</tr>
<tr>
<td>M91</td>
<td>Electronic Office Management Menu</td>
</tr>
<tr>
<td>292</td>
<td>PIP Document Browse</td>
</tr>
<tr>
<td>293</td>
<td>PIP Browse by Purch. Document</td>
</tr>
<tr>
<td>294</td>
<td>PIP Browse by Invoice</td>
</tr>
<tr>
<td>850</td>
<td>FRS Person Information</td>
</tr>
<tr>
<td>860</td>
<td>Department Table Maintenance</td>
</tr>
<tr>
<td>910</td>
<td>Document Inbox</td>
</tr>
<tr>
<td>911</td>
<td>Document Inbox by Name</td>
</tr>
<tr>
<td>912</td>
<td>Document Outbox</td>
</tr>
<tr>
<td>913</td>
<td>Document Outbox by Name</td>
</tr>
<tr>
<td>914</td>
<td>Document Routing History</td>
</tr>
<tr>
<td>915</td>
<td>Approval Profile by Name</td>
</tr>
<tr>
<td>918</td>
<td>Documents by Department</td>
</tr>
<tr>
<td>920</td>
<td>Dept View Create/Modify</td>
</tr>
<tr>
<td>921</td>
<td>Dept Paths Create/Modify</td>
</tr>
<tr>
<td>922</td>
<td>Approver Desk Create/Modify</td>
</tr>
<tr>
<td>923</td>
<td>Signer Desk Modify</td>
</tr>
</tbody>
</table>
Appendix – Routing and Approval Screens List (cont’d)

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

<table>
<thead>
<tr>
<th>FIELD Name</th>
<th>Type &amp; Valid Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox Action:</td>
<td>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:</td>
</tr>
<tr>
<td>APP</td>
<td>Approve the document.</td>
</tr>
<tr>
<td>FYA</td>
<td>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.</td>
</tr>
<tr>
<td>FRA</td>
<td>Route for Approval and Return. This document will be returned to you for approval before it goes to any other approvers.</td>
</tr>
<tr>
<td>FYI</td>
<td>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.</td>
</tr>
<tr>
<td>HLD</td>
<td>Mark the document as HELD by me to take action</td>
</tr>
<tr>
<td>REJ</td>
<td>Reject this document back to the creator for revision</td>
</tr>
<tr>
<td>DIS</td>
<td>Discard information/notification copy from my INBOX</td>
</tr>
<tr>
<td>FYP</td>
<td>Forward for processing (Processing Dept ONLY)</td>
</tr>
<tr>
<td>SUB</td>
<td>Submit the document for approval</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form:</th>
<th>Type of document:</th>
</tr>
</thead>
<tbody>
<tr>
<td>DBR</td>
<td>Dept Budget Request</td>
</tr>
<tr>
<td>EBR</td>
<td>Employee Budget Request</td>
</tr>
<tr>
<td>EGR</td>
<td>Employee Grad Request</td>
</tr>
<tr>
<td>EWR</td>
<td>Employee Wage Request</td>
</tr>
<tr>
<td>PBD</td>
<td>Bid</td>
</tr>
<tr>
<td>PEP</td>
<td>Exempt Purchase</td>
</tr>
<tr>
<td>PIP</td>
<td>Invoice Problem</td>
</tr>
<tr>
<td>PLP</td>
<td>Limited Purchase</td>
</tr>
<tr>
<td>PPO</td>
<td>Purchase Order</td>
</tr>
<tr>
<td>PRQ</td>
<td>Requisition</td>
</tr>
</tbody>
</table>
### Appendix – Valid Field Values (cont’d)

<table>
<thead>
<tr>
<th>FIELD Name</th>
<th>Type &amp; Valid Values</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requested Action:</strong></td>
<td>Identifies the action needed for the document. Valid values are:</td>
</tr>
<tr>
<td>FYA/Approve</td>
<td>For Your Approval Routing</td>
</tr>
<tr>
<td>FRA/Approve</td>
<td>For Return Approval Routing</td>
</tr>
<tr>
<td>Revise</td>
<td>Revise and route</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve and route</td>
</tr>
<tr>
<td>Notify</td>
<td>Notification copy</td>
</tr>
<tr>
<td>FYI</td>
<td>For Your Information only</td>
</tr>
<tr>
<td>Sign required</td>
<td>Signer desk approval required</td>
</tr>
<tr>
<td><strong>Status:</strong></td>
<td>Shows the document progress</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Document cancelled</td>
</tr>
<tr>
<td>Completed</td>
<td>Document completed</td>
</tr>
<tr>
<td>In Dept Rt</td>
<td>In department routing (not FYA/FRA)</td>
</tr>
<tr>
<td>FYA/FRA Rt</td>
<td>For Your Approval routing (in department routing but not through path)</td>
</tr>
<tr>
<td>Rejected</td>
<td>Document rejected</td>
</tr>
<tr>
<td>Recalled</td>
<td>Document recalled</td>
</tr>
<tr>
<td>In Proc Rt</td>
<td>In Processing routing</td>
</tr>
<tr>
<td>In Exec Rt</td>
<td>In Executive routing</td>
</tr>
<tr>
<td>Final</td>
<td>Finished routing</td>
</tr>
<tr>
<td><strong>Type:</strong></td>
<td>Identifies the type of routing. Valid values include:</td>
</tr>
<tr>
<td>APP</td>
<td>Approve the document.</td>
</tr>
<tr>
<td>FYA</td>
<td>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.</td>
</tr>
<tr>
<td>FRA</td>
<td>Route for Approval and Return. This document will be returned to you for approval before it goes to any other approvers.</td>
</tr>
<tr>
<td>FYI</td>
<td>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.</td>
</tr>
<tr>
<td>HLD</td>
<td>Mark the document as HELD by me to take action</td>
</tr>
<tr>
<td>REJ</td>
<td>Reject this document back to the creator for revision</td>
</tr>
<tr>
<td>DIS</td>
<td>Discard information/notification copy from my INBOX</td>
</tr>
<tr>
<td>FYP</td>
<td>Forward for processing (Processing Dept ONLY)</td>
</tr>
<tr>
<td>SUB</td>
<td>Submit the document for approval</td>
</tr>
</tbody>
</table>
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.
Appendix – Valid Field Values (cont’d)

Names
Displays 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.

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.

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)

Summ: Provides view of document which is similar to a printed document. See Screen 288.

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.