

Electronic Office Quick Guide

Version 1.0
July 2023

FAMIS Services
The Texas A&M University System

Quick Reference Departmental Office Setup

Office Level

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

Department Level

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

Quick Reference Executive Office Setup

Office Level

Create Office <i>Screen 940</i>	Type in: Name for the Office Description, Manager UIN, Delegates UIN, Default Signer UIN
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Executive Level

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

Quick Reference Processing Office Setup

Office Level

Create Office <i>Screen 940</i>	Type in: Name for the Office Description, Manager UIN, Delegates UIN, Default Signer UIN
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Processing Level

Create View <i>Screen 940</i>	Type in: Office Name “Y” next to Processing View Dept code or repeat Office Name under View Name
Processing Desks Add People <i>Screen 922</i>	Type in: Office Name, View Name and Desk Description Function – Add (A), Update (U), Delete (D) Type – blank or Substitute (S) UIN
Create New Paths <i>Screen 926</i>	Type in: Office Name Description Function – Add (A), Update (U), Delete (D) Form, Path Category, Desk(s)

Quick Reference Departmental Office Delete

Departmental Level

Delete Desks <i>Screen 921</i>	Delete all desks on all paths except the default path by entering "U" in Function, and space out the desk name.
Delete Paths <i>Screen 921</i>	Delete all paths except the default path by entering "D" in the Function.
Delete Creator Desk <i>Screen 924</i>	Delete all Creator Desks for all Forms except the default Form (blank) by entering "Y" in Delete Desk field.
Delete Approver Desks <i>Screen 922</i>	Delete all Approver Desks for that Office by entering "Y" in Delete Desk field.
Delete Signer Desk <i>Screen 923</i>	Delete all signer Desks for all Forms except the default (blank) by entering "Y" in Delete Desk field.
Delete Units in View(s) <i>Screen 920</i>	Delete all Dept/SubDept from the View(s) by entering "D" in the Function field.
Delete the View(s) <i>Screen 928</i>	Delete the View(s) by keying in the View name. <i>Screens 936 and 937 should have nothing to display.</i>
Delete Exec Level from Unit <i>Screen 941</i>	Delete the Exec Level from Unit(s) by spacing out the Exec Office name.
Delete Office from Unit <i>Screen 941</i>	Delete the Office from Unit(s) by spacing out the Office name. <i>Screen 935 should have nothing to display.</i>

Office Level

Delete the Office <i>Screen 944</i>	Delete the Office by entering "Y" to Delete.
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Quick Reference Executive Office Delete

Executive Level

Delete Desks <i>Screen 925</i>	Delete all desks on all paths except the default path by entering "U" in Function, and space out the desk name.
Delete Paths <i>Screen 925</i>	Delete all paths except the default path by entering "D" in the Function.
Delete Approver Desks <i>Screen 922</i>	Delete all Approver Desks for that Office by entering "Y" in Delete Desk field. <i>Screen 937 should have nothing to display</i>
Delete Exec Level from Unit <i>Screen 941</i>	Delete the Exec Level from Unit(s) by spacing out the Exec Office name. Units are listed on Screen 935.

Office Level

Remove View from Office <i>Screen 945</i>	Submit CE to FAMIS Services requesting View be removed.
Delete the Office <i>Screen 944</i>	Delete the Office by entering "Y" to Delete.

Quick Reference Processing Office Delete

Processing Level

Delete Desks <i>Screen 926</i>	Delete all desks on all paths except the default path by entering "U" in Function, and space out the desk name
Delete Paths <i>Screen 926</i>	Delete all paths except the default path by entering "D" in the Function
Delete Approver Desks <i>Screen 922</i>	Delete all Approver Desks for that Office by entering "Y" in Delete Desk field. <i>Screen 937 should have nothing to display</i>

Office Level

Remove View from Office <i>Screen 945</i>	Submit CE to FAMIS Services requesting View be removed
Delete the Office <i>Screen 944</i>	Delete the Office by entering "Y" to Delete