Departmental Guide to Document Boxes
September 2000

The following is a summary of the document box screens, document forms, approval types, routing statuses, and approval actions that a user can take if there is a document in his/her FAMIS in-box. This information was adapted from the Creator's Manual and from FAMIS Services User's Manuals.

Types of Document Boxes

Screen	Name	Description
910	Document In-Box	Personal in-box screen.
911	Document In-Box by Name	Used to view or take action on a document in another person's in-box.
912	Document Out-Box	Once action is taken on a routing document, it goes to your out-box. You may recall documents using the PF5 key on this screen.
913	Deleted Documents	Lists routing documents that creators have deleted for a department/subdepartment.
914	Document Routing History	Used to view the routing history and to see who has a document. Document numbers must include the form, campus code, and document number (e.g., PLP02L000001).
915	Approval Profile by Name	Shows the routing desks for which a person has access (e.g., creator, approver, signer).
916	Approval Document In-Box	Used to access **only** documents awaiting your approval. It does not show any other document type.
917	Approval Document In-Box by Name	Used to access **only** documents awaiting approval in an in-box for which you are a substitute. (You may search for specific documents, making it convenient if the in-box has several documents.)

Screen 910 - Document In-Box

❶ Form Type

```
910 Document In-Box                                  09/27/00 09:51
                                                          CC SA
Screen: ___  Office: _____  Desk: _____   Form: PLP

                                              PANEL: 01MORE>>
Sel Document ID  N        Doc Summary          Typ   Status
--- ----------- - ------------------------------------ --- --------------
 _   PLP02L000030   FILING CABINETS                 A   PROPOSED
```

NOTE: Document ID includes the Form Type

Type an X in the Sel: field to select the document and press <ENTER> or F8.

❶ **FORM TYPE**

PBD	**B**i**d**
PEP	**E**xempt **P**urchase
PIP	**I**nvoice **P**roblem
PLP	**L**imited **P**urchase
PPO	**P**urchase **O**rder
PRQ	**R**e**q**uisition

❷ Approval Type

❸ Status

❷ APPROVAL TYPE

A .... Waiting for you to **A**pprove the document.
C .... Either you **C**reated or Recalled a document. You need to route it.
F .... Routing is **F**inished and document is signed. If PRQ, Purchasing transferred it to a PPO or PBD.
H .... Document is being **H**eld in your in-box, or Purchasing Services is holding the requisition.
I .... Someone sent you an **I**nformation copy of a document.
N .... **N**otification copy of a document.
R .... Approver or signer **R**ejected document back to you (the creator).
S .... Your **S**ubstitute is holding the document.

❸ STATUS

Held .... Document is being held by someone for further action.
Pending .... Completed departmental routing and requisition is now pending at Purchasing Services.
Proposed .... Document is routing through the departmental level.
Recalled .... Creator recalled the document. (Creators & approvers can recall. The final signer cannot.)
Rejected .... Approver/signer rejected the document back to the creator.
Rerouted .... Document is re-entering the routing system after being recalled or rejected.

Actions to Take on Specific Forms and Approval Types

❶ Form Type

Screen 910 - Document In-Box

❹ ACTION *What you need to type in the Action field after selecting a document.*

```
910 Document In-Box                                09/27/00 09:51
                                                   CC SA
Screen: ___  Office: _____   Desk: _____     Form: PLP

                                          PANEL: 01MORE>>
Sel Document ID N       Doc Summary             Typ    Status
--- ----------- - ------------------------------ --- --------------
 _  PLP02L000030   FILING CABINETS                A   PROPOSED
```

APP .... **App**rove this document and route forward.
BCK............... **B**ack**out** previous approval and return to previous routing desk.
DEL .... **Del**ete this document. Only the creator can delete.
DIS................. **Dis**card an information copy of the document.
FYI................. Send a **F**or **Y**our **I**nformation copy to someone else.
HLD .... Mark the document as **h**e**ld** for further action.
NOT .... Display or enter routing **not**es.
REJ............... **Rej**ect the document back to the creator for revisions.
ROU…………..**D**isplay the document's **rou**ting history. (See Screen 914).

NOTE: Document ID includes the Form Type

Type an X in the Sel: field to select the document and press <ENTER> or F8.

❷ Approval Type

❸ Routing Status

❷ Approval Type	Approval Type Meaning	❸ Status	❹ Most Common Action
PEP, PLP and PRQ			
A	Waiting for you to **A**pprove the document.	Proposed, Rerouted	APP, REJ (See ❹ **Action** for other choices)
C	Either you **C**reated or Recalled a document. You need to route the document.	Created, Recalled	Creators can APP or use Screen 237, 242 or 256 and press PF7 to route the document. Approvers type APP or REJ. (See ❹ **Action** for other choices)
I	Someone sent you an **I**nformation copy of a document.	Rejected, Recalled, Rerouted, Held, Proposed/FYA, Pending	DIS (See ❹ **Action**)
H	Either you or Purchasing Services is **H**olding a document.	Held	To release the hold, the holder may do everything in ❹ **Action** except DEL & DIS.
S	Your **S**ubstitute is holding the document.	Held	To release the hold, substitute may do all in ❹ **Action** except DEL and DIS.
R	Approver or signer **R**ejected document back to you.	Rejected	NOT. Use Screen 238, 243, or 258 to delete or reopen a document to correct.
PIP			
A	Waiting for you to **A**pprove the PIP. FMS found a problem with the document that needs approval to correct. ***They will correct it, not you.***	Proposed	1) Select document. Use NOT. Read & insert notes telling FMS what to do. 2) APP. This will re-route PIP through your department to the auditor who created it, who will make the corrections. ***DO NOT go to Screen 238, 243 or 258 to reopen document and make corrections.*** 3) You may also use REJ to reject the PIP to the FMS auditor who created it.
N	**N**otification of a problem preventing payment (i.e., signer needs to sign document or you need to do receiving).	FYI/Notify	DIS. Do what the PIP says (i.e., tell signer to sign the document or do receiving using Screens 320-326).
PLP & PEP Only			
F	Routing is **F**inished, and document is signed.	Approved	DEL
PRQ Only			
N	**N**otification that your signer signed the requisition and routed it to Purchasing Services for processing.	Pending, Held	DIS
F	**F**inished routing. Purchasing transferred PRQ.	Approved	DEL. Retrieve the bid or purchase order number using Screen 290.