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

<table>
<thead>
<tr>
<th>Screen</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>910</td>
<td>Document In-Box</td>
<td>Personal in-box screen.</td>
</tr>
<tr>
<td>911</td>
<td>Document In-Box by Name</td>
<td>Used to view or take action on a document in another person’s in-box.</td>
</tr>
<tr>
<td>912</td>
<td>Document Out-Box</td>
<td>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.</td>
</tr>
<tr>
<td>913</td>
<td>Deleted Documents</td>
<td>Lists routing documents that creators have deleted for a department/subdepartment.</td>
</tr>
<tr>
<td>914</td>
<td>Document Routing History</td>
<td>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).</td>
</tr>
<tr>
<td>915</td>
<td>Approval Profile by Name</td>
<td>Shows the routing desks for which a person has access (e.g., creator, approver, signer).</td>
</tr>
<tr>
<td>916</td>
<td>Approval Document In-Box</td>
<td>Used to access only documents awaiting approval. It does not show any other document type.</td>
</tr>
<tr>
<td>917</td>
<td>Approval Document In-Box by Name</td>
<td>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.)</td>
</tr>
</tbody>
</table>

Screen 910 - Document In-Box

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Approval Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PBD</td>
<td>A</td>
<td>Held</td>
</tr>
<tr>
<td>PBD</td>
<td>C</td>
<td>Pending</td>
</tr>
<tr>
<td>PEP</td>
<td>F</td>
<td>Recalled</td>
</tr>
<tr>
<td>PIP</td>
<td>H</td>
<td>Rejected</td>
</tr>
<tr>
<td>PLP</td>
<td>I</td>
<td>Rerouted</td>
</tr>
<tr>
<td>PPO</td>
<td>N</td>
<td>Rejected</td>
</tr>
<tr>
<td>PRQ</td>
<td>R</td>
<td>Rejected</td>
</tr>
</tbody>
</table>

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

APPROVAL TYPE

A...................... Waiting for you to Approve the document.
C...................... Either you Created or Recalled a document. You need to route it.
F...................... Routing is Finished and document is signed. If PRQ, Purchasing transferred it to a PPO or PBD.
H...................... Document is being Held in your in-box, or Purchasing Services is holding the requisition.
I...................... Someone sent you an Information copy of a document.
N...................... Notification copy of a document.
R...................... Approver or signer Rejected document back to you (the creator).
S...................... Your Substitute is holding the document.

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

#### Screen 910 - Document In-Box

**Form Type**

<table>
<thead>
<tr>
<th>Sel Document ID</th>
<th>N</th>
<th>Doc Summary</th>
<th>Typ</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLP02L000030</td>
<td></td>
<td>FILING CABINETS</td>
<td>A</td>
<td>PROPOSED</td>
</tr>
</tbody>
</table>

**NOTE:** Document ID includes the Form Type

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

#### Approval Type

**Approval Type Meaning**

- **PEP, PLP and PRQ**
  - **A**: Waiting for you to Approve the document. (Proposed, Rerouted) **APP, REJ** (See **Action** for other choices)
  - **C**: Either you Created or Recalled a document. You need to route the document. **Creators can APP or use Screen 237, 242 or 256 and press PF7 to route the document. Approvers type APP or REJ.** (See **Action** for other choices)
  - **I**: Someone sent you an Information copy of a document. **Rejected, Recalled, Rerouted, Held, Proposed/FYA, Pending** **DIS (See **Action**)**
  - **H**: Either you or Purchasing Services is Holding a document. **Held** To release the hold, the holder may do everything in **Action** except DEL & DIS.
  - **S**: Your Substitute is holding the document. **Held** To release the hold, substitute may do all in **Action** except DEL and DIS.
  - **R**: Approver or signer Rejected 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 Approve 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**: Notification 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 Finished, and document is signed. **Approved** **DEL**

- **PRQ Only**
  - **N**: Notification that your signer signed the requisition and routed it to Purchasing Services for processing. **Pending, Held** **DIS**
  - **F**: Finished routing. Purchasing transferred PRQ. **Approved** **DEL. Retrieve the bid or purchase order number using Screen 290.**

#### Approval Type

**Most Common Action**

- **APP** ................ **Approve this document and route forward.**
- **BCK** ............... **Back out previous approval and return to previous routing desk.**
- **DEL** ............. **Delete this document. Only the creator can delete.**
- **DIS** .............. **Discard an information copy of the document.**
- **FYI** ................. **Send a For Your Information copy to someone else.**
- **HLD** ............... **Mark the document as held for further action.**
- **NOT** ............... **Display or enter routing notes.**
- **REJ** ............... **Reject the document back to the creator for revisions.**
- **ROU** ............... **Display the document’s routing history.** (See Screen 914).