

Section IV

Electronic Office Basics

Office Manager & Delegates

Perspective

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

M91 Electronic Office Mgmt Menu		06/06/07 09:02
Screen: _____		FY 2007 CC 02
* --- Departmental Functions ----- *	* ----- Inquiry Functions ----- *	
920 Dept View Create/Modify	945 Office Browse	
924 Creator Desk Modify	935 Dept/SDept by Office	
922 Approver Desk Create/Modify	936 Views by Office	
923 Signer Desk Modify	937 Desks by Office	
921 Dept Paths Create/Modify	938 Office/Desk Workload	
928 Dept View Delete		
930 Desk Copy	* -- Administrative Functions --- *	
	940 Office Create/Modify	
	941 Unit to Office Assignment	
	943 Security Signer Desk	
* ----- Special Functions ----- *	944 Office Delete	
925 Exec Paths Create/Modify		
926 Proc Paths Create/Modify		
	950 Electronic Documents Profiles	
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.

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 receive 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.

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.

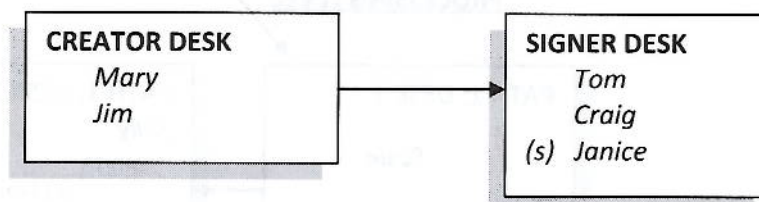
Document Forms and Routing Paths

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



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?

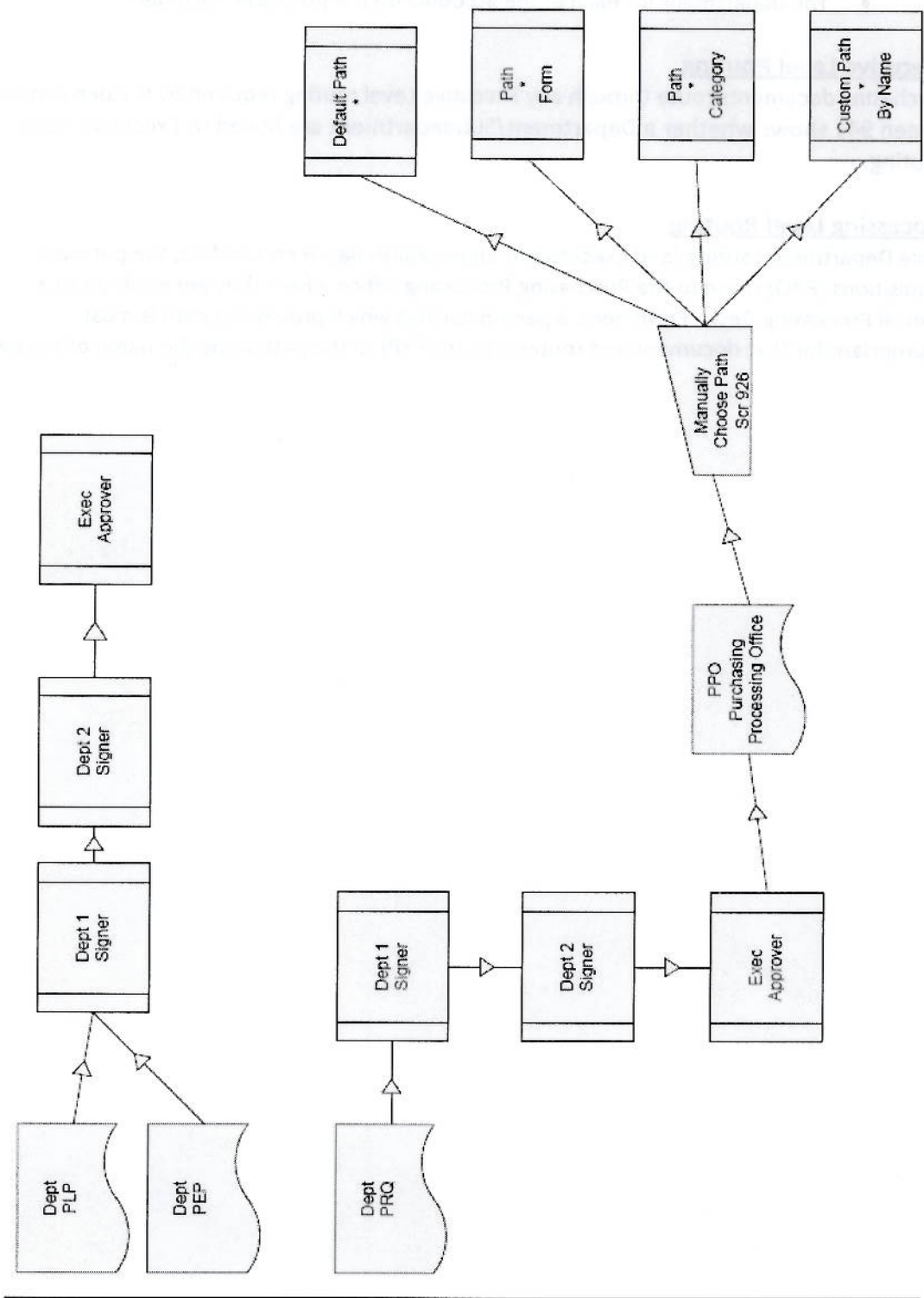
Some departments may require routing through an Executive Level after completing Department routing. You can see the Electronic Office and Executive Level on the Department Table (Screen 860).

Is There A Processing Office Required For This Document?

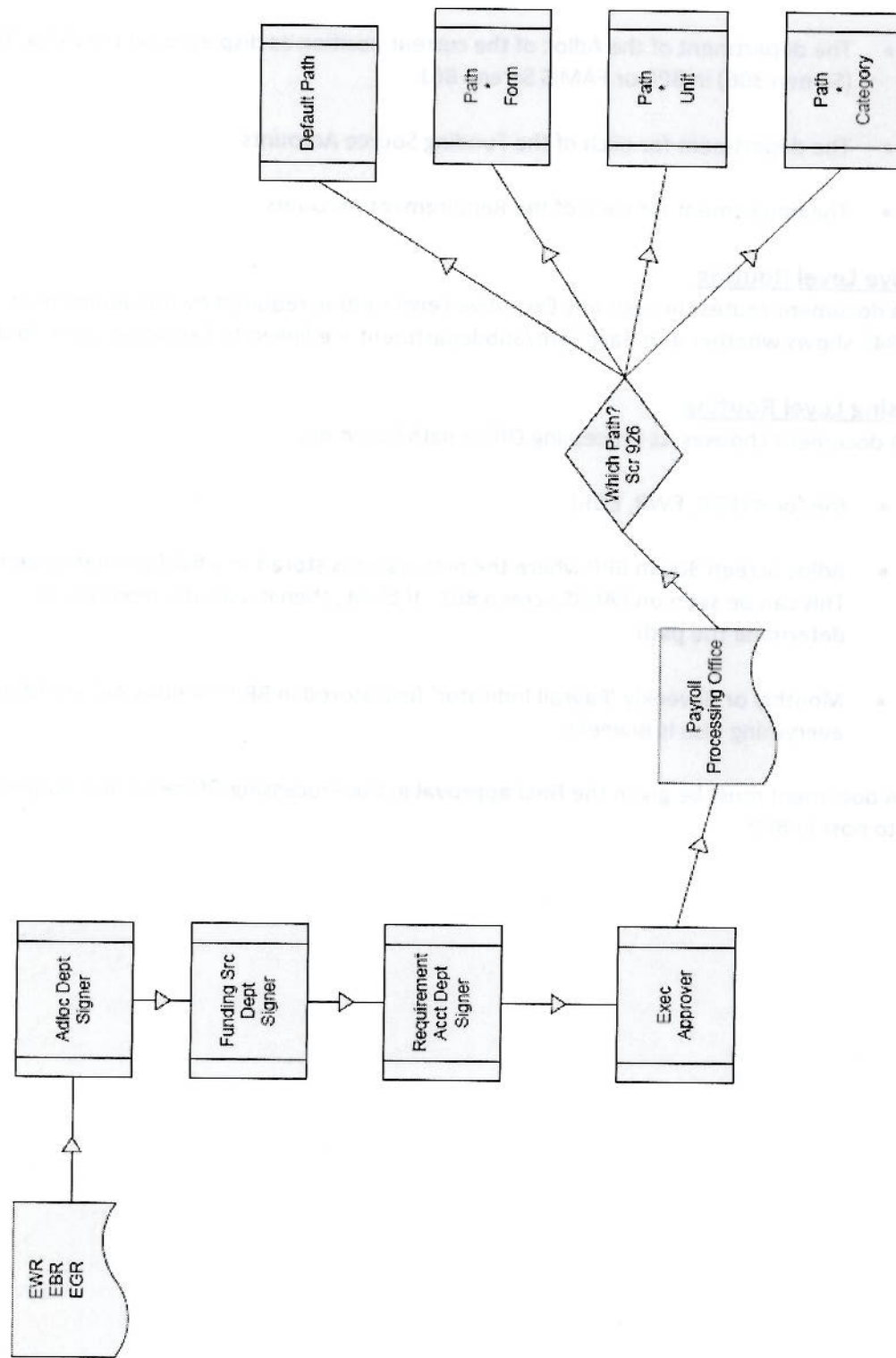
Certain documents are required to route through a Processing Office after finishing routing in the Department Level and, if required, the Executive Level.

Guidelines by Document Type or Form

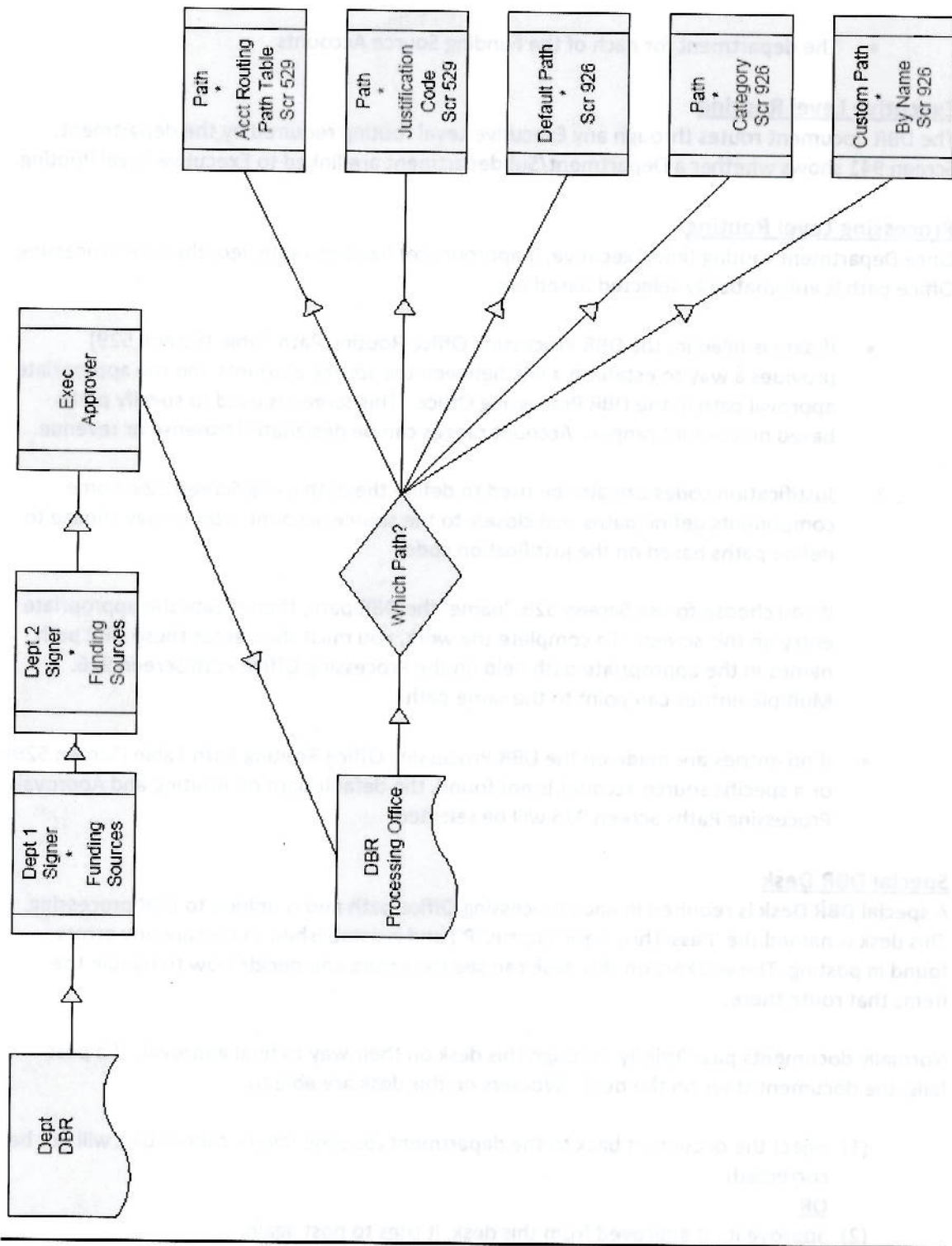
Purchasing Documents – PRQ, PLP, PEP, PPO



EPA Documents – EBR, EWR, EGR



DBR Documents DBR



Essentials of Routing Extended (cont'd)

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

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

Screen 915 – Approval Profile by Name (cont'd)

Office:	10 characters Displays the <u>title of the office</u> in which the person has approval authority.
Desk:	10 characters Identifies the <u>name of the desk</u> where the person has approval authority.
Status:	<div><div>Help</div>1 character Indicate the <u>status of how the document should go to the desk</u>. Blank = Approval I = Information N = Notification</div>
View:	10 characters Displays the <u>name of the view</u> where a person has approval authority on a signer or creator desk. <div>This is only applicable to signer/ creator desks.</div>

Additional Information

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

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.



Screen 936 – Views by Office (cont'd)

View: 10 characters
Identify the view you wish to position at the top of the screen.

Screen Information

View Name: 10 characters
Displays the name(s) of the views within the electronic office listed in alphabetical order.

View Description: 10 characters
Shows text description each of the views.

Nbr Units: 9 digits
Identifies of the number of units assigned to the view.

Type: 1 character
Indicates the type of view displayed. D (departmental), E (executive), and P (processing).

Additional Functions

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

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**
- Names** Displays the names of the desk assignees in a pop-up window when the cursor is anywhere on a desk line.

Screen 938 – Office/Desk Workload (cont'd)

Screen 938 - Office/Desk Workload (Panel 3)

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938 Office/Desk Workload                                06/06/07 16:05
                                                         CC 02
Screen:  Office: PURCHASING Desk:  Form:  PANEL: 03
               <<MORE
----- Current -----
Document ID  CC  Unit  Office  Desk  View
-----
PPO02P602188 02      PURCHASING ADMIN  PURS
PLP02A734236 02 PURS  PURCHASING APPROVE  PURCHASING
PLP02A735148 02 PURS  PURCHASING APPROVE  PURCHASING
PLP02A735151 02 PURS  PURCHASING APPROVE  PURCHASING
PLP02A735242 02 PURS  PURCHASING APPROVE  PURCHASING
PRQ02R800153 02      PURCHASING CENTRLDESK  PURS
PRQ02R800156 02      PURCHASING CENTRLDESK  PURS
PRQ02R800155 02      PURCHASING CENTRLDESK  PURS
PRQ02R800157 02      PURCHASING CENTRLDESK  PURS
PRQ02R800158 02      PURCHASING CENTRLDESK  PURS
PRQ02R800154 02      PURCHASING CENTRLDESK  PURS
PRQ02R703900 02      PURCHASING CENTRLDESK  PURS

*** Press ENTER to view more documents ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Hmenu Help  EHelp      Names      Left Right
  
```

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: Help 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).

Screen 938 – Office/Desk Workload (cont'd)

Unit:	10 characters Identifies the <u>unit</u> to which the document has <u>currently</u> been <u>routed</u> .
Office:	10 characters Indicates the <u>office</u> at which the document is <u>currently located</u> .
Desk:	10 characters/digits Represents the <u>desk</u> at which the document is <u>currently located</u> .

Additional Functions

PF KEYS	See the Appendix for explanations of the standard PF Keys.
PF7 RHist	Routing History Shows the <u>routing information</u> for the document.
PF7 Names	Names of Desk Assignees Displays the <u>names of the desk assignees</u> in a pop-up window when the cursor is anywhere on a desk line.