Section IV
Electronic Office Basics
Office Manager & Delegates
Perspective
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>Screen:</th>
<th>05/06/07 09:02</th>
</tr>
</thead>
<tbody>
<tr>
<td>920 Dept View Create/Modify</td>
<td>945 Office Browse</td>
</tr>
<tr>
<td>924 Creator Desk Modify</td>
<td>935 Dept/SD Dept by Office</td>
</tr>
<tr>
<td>922 Approver Desk Create/Modify</td>
<td>936 Views by Office</td>
</tr>
<tr>
<td>923 Signer Desk Modify</td>
<td>937 Desks by Office</td>
</tr>
<tr>
<td>921 Dept Paths Create/Modify</td>
<td>938 Office/Desk Workload</td>
</tr>
<tr>
<td>920 Dept View Delete</td>
<td></td>
</tr>
<tr>
<td>930 Desk Copy</td>
<td></td>
</tr>
<tr>
<td>925 Exec Paths Create/Modify</td>
<td>940 Office Create/Modify</td>
</tr>
<tr>
<td>926 Proc Paths Create/Modify</td>
<td>941 Unit to Office Assignment</td>
</tr>
<tr>
<td>943 Security Signer Desk</td>
<td></td>
</tr>
</tbody>
</table>

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 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.
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**

![Diagram of DEPARTMENT LEVEL routing](image)
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*
DBR Documents  DBR

- Path
- Justification Code
- Default Path
- Category
- Custom Path

- Exec. Approver
- Dept 2 Signer
- Dept 1 Signer
- DBR Processing Office

Which Path?

- Dept DBR

Routing and Approvals User Manual
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.
## Productivity Aids Inquiry

### Aids for Management of the Routing Structures

<table>
<thead>
<tr>
<th>Aids</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>List Approval Profile</strong></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>Screen 915</td>
<td></td>
</tr>
<tr>
<td><strong>Lists Offices</strong></td>
<td>Lists all the Electronic Offices; Indicates when office is an Executive or Processing Office</td>
</tr>
<tr>
<td>Screen 945</td>
<td></td>
</tr>
<tr>
<td><strong>Lists Units in Office</strong></td>
<td>Lists Units (depts./subdepts valid for an Office)</td>
</tr>
<tr>
<td>Screen 935</td>
<td></td>
</tr>
<tr>
<td><strong>List Desks in Office</strong></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>Screen 937</td>
<td></td>
</tr>
<tr>
<td><strong>List Views by Office</strong></td>
<td>Lists all the valid views for an Office</td>
</tr>
<tr>
<td>Screen 936</td>
<td></td>
</tr>
<tr>
<td><strong>Office/Desk Workload</strong></td>
<td>Lists documents in routing for an electronic office</td>
</tr>
<tr>
<td>Screen 938</td>
<td></td>
</tr>
<tr>
<td><strong>Documents by Dept</strong></td>
<td>Lists documents in routing for a department</td>
</tr>
<tr>
<td>Screen 918</td>
<td></td>
</tr>
<tr>
<td><strong>Person Table</strong></td>
<td>Lists people, their UIN and location information</td>
</tr>
<tr>
<td>Screen 850</td>
<td></td>
</tr>
<tr>
<td><strong>Dept Table</strong></td>
<td>Lists all the department/subdepartments and the Electronic Office and Executive Level</td>
</tr>
<tr>
<td>Screen 860</td>
<td></td>
</tr>
</tbody>
</table>
### Screen 915 – Approval Profile by Name (cont’d)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office:</td>
<td>10 characters&lt;br&gt;Displays the <strong>title of the office</strong> in which the person has approval authority.</td>
</tr>
<tr>
<td>Desk:</td>
<td>10 characters&lt;br&gt;Identifies the <strong>name of the desk</strong> where the person has approval authority.</td>
</tr>
<tr>
<td>Status:</td>
<td>1 character&lt;br&gt;<strong>Help</strong>&lt;br&gt;Indicate the <strong>status of how the document should go to the desk</strong>. &lt;br&gt;Blank = Approval&lt;br&gt;I = Information&lt;br&gt;N = Notification</td>
</tr>
<tr>
<td>View:</td>
<td>10 characters&lt;br&gt;Displays the <strong>name of the view</strong> where a person has approval authority on a signer or creator desk. <strong>This is only applicable to signer/creator desks.</strong></td>
</tr>
</tbody>
</table>

**Additional Information**

**PF Keys**<br>See the Appendix for explanations of the standard PF Keys.
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)

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>10 characters Identify the view you wish to position at the top of the screen.</td>
</tr>
<tr>
<td><strong>Screen Information</strong></td>
<td></td>
</tr>
<tr>
<td>View Name:</td>
<td>10 characters Displays the name(s) of the views within the electronic office listed in alphabetical order.</td>
</tr>
<tr>
<td>View Description:</td>
<td>10 characters Shows text description each of the views.</td>
</tr>
<tr>
<td>Nbr Units:</td>
<td>9 digits Identifies the number of units assigned to the view.</td>
</tr>
<tr>
<td>Type:</td>
<td>1 character Indicates the type of view displayed. D (departmental), E (executive), and P (processing).</td>
</tr>
</tbody>
</table>

**Additional Functions**

PF KEYS: See the Appendix for an explanation of the standard PF Keys.
Screen 937 – Desks by Office (cont’d)

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.
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, ?, * 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).
**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**

<table>
<thead>
<tr>
<th>PF KEYS</th>
<th>See the Appendix for explanations of the standard PF Keys.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PF7</strong></td>
<td><strong>Routing History</strong> Shows the routing information for the document.</td>
</tr>
<tr>
<td><strong>RHlist</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>