

Routing and Approvals

PRESENTED BY DUSTIN HALL

Famis Routing and Approval

Objectives of This Training

This Training will provide an overview and review of the required Signature Cards and Famis Screens for Famis Routing and Approval.

Additionally, we will cover specific screens in FAMIS that will help with viewing a departments current routing paths.

Table of Contents

Signature Cards – Types and Quick Review

Routing Screens in Famis

Quick Step – Famis Tool Option

Department Paths

Overview of Resources and Questions

Department Signature Card

TEXAS A & M UNIVERSITY-CORPUS CHRISTI
DEPARTMENT SIGNATURE CARD

Date: Department Name: Famis Department Code:

Authority to Commit Funds: The Department Signature Card designates individuals with direct authority and related responsibility to commit funds for a particular department. The Department Head/Dean has the authority to sign all financial documentation related to his/her department and to delegate authority to other individuals (business coordinators, assistant directors, directors, department chairs, associate/assistant deans, deans, associate/assistant vice presidents). The Department Signature Card is the Department Head's authorization of such delegation. A new signature card signed by all authorized persons will be required each time a change (add or delete) occurs. The Department is responsible for updating the Department Signature Card and forwarding to FAMIS Security when approval changes occur.

As Department Head, I authorize the individuals signing below to have direct authority and related responsibility to commit funds for my department. The areas in which they are authorized are indicated in the checkboxes below. Each person understands that they will be required to complete the Guidelines for Disbursement of Funds training prior to committing funds.

Each Department will need to decide if the Names below will be a **Primary Signature (P)** or will service as a **Substitute (S)** for the Primary Signer. Signer must have active FAMIS/Canopy access and provide their FAMIS ID as indicated below. **If additional space is needed, please use the second page.**

----- (Check boxes below as appropriate) -----

Name/Job Title Must include the Department Head	Signer FAMIS/Canopy ID (xxxx15p)	Signature	Islanderbuy Purchasing	Manual Payments	Payroll	Budget (DBR)	FAMIS (DCR)
Department Head			Yes ▾	P ▾	P ▾	P ▾	P ▾
			Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾
			Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾
			Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾	Pick One ▾

Will the Responsible Person listed on the current departmental accounts need to be changed? Yes No. If yes, please provide us a UIN for the responsible person

LEGEND:

FAMIS/Purchasing: Requisitions and E's; DCR's

Department Head Printed Name /Job Title

Manual Payments: Voucher Creates, Petty Cash Forms, Travel Vouchers
Payroll: E** documents
Budget: DBR's

Department Head Signature

This form establishes the routing and approval of all documents other than concur expenses and transferring of departmental property.

http://comptroller.tamucc.edu/accounting/online_forms.html

Review of Famis Forms: Three Routing and Approval Forms

Concur Expense Report Approval Authorization Form

TEXAS A&M UNIVERSITY-CORPUS CHRISTI
CONCUR ROUTING (TRAVEL) APPROVAL FORM
FAMIS SCREEN 919

FOUR/FIVE LETTER DEPT CODE: _____ DATE: _____
SUB DEPT CODE: _____
RESPONSIBLE PERSON: _____ UIN: _____
(s/b listed as approver below)
CONTACT PERSON: _____ EXT: _____

APPROVER #1 (optional-fill in if a stop is needed prior to final approver)

NAME _____
UIN _____

APPROVER # 1 – SUB Approver #1 will need to set up an Expense Delegate Approver WITHIN Concur to serve as a substitute.

FINAL APPROVER (only stop or final stop to approver #1)

NAME _____
UIN _____ SIGNATURE _____

***ALTERNATE FINAL APPROVER** (required but only applicable if the final approver is the person traveling)

NAME _____
UIN _____ SIGNATURE _____

FOUR/FIVE LETTER CODE - the four or five digit department code, not the department name (i.e. ACCT)

SUBDEPT CODE - the four or five digit subdepartment code; not subdept name (i.e. RES1)

Please be sure the department-subdept correspond with FAMIS. We will need a separate form for each subdepartment

RESPONSIBLE PERSON-the responsible person of the department. The person listed on this line is not automatically given approver access; they must be listed as an approver on the boxes below.

CONTACT PERSON-a person we can contact with questions concerning this form

APPROVER#1 (optional)- the person you want as first approver in the routing path of document; this person will be the stop prior to the final approver.

FINAL APPROVER - the person you want as final approver in the routing path of document

Email completed form to famis.security@tamucc.edu or fax to ext 5925.

***ALTERNATE FINAL APPROVER**- this person should be the supervisor or in a higher position of the final approver. They will only approve the final approver's travel.

This form establishes the routing path for all travel documents for a department.

<http://comptroller.tamucc.edu/accounting/assets/CONCUR%20ROUTING%20APPROVAL%20FORM.pdf>

Review of Famis Forms: Three Routing and Approval Forms

Concur PCard Approval Authorization Form (New)

TEXAS A&M UNIVERSITY-CORPUS CHRISTI
CONCUR ROUTING (PCARD) APPROVAL FORM

FOUR/FIVE LETTER DEPT CODE: _____ DATE: _____
SUB DEPT CODE: _____
RESPONSIBLE PERSON: _____ UIN: _____
(s/b listed as approver below)
CONTACT PERSON: _____ EXT: _____

APPROVER #1 (optional-fill in if a stop is needed prior to final approver)	
NAME _____	_____
UIN _____	SIGNATURE _____
APPROVER #1 - SUB Needs to be set up as an Expense Delegate Approver in Concur	
NAME _____	_____
UIN _____	SIGNATURE _____
FINAL APPROVER (ONLY STOP OR FINAL STOP TO APPROVER #1)	
NAME _____	_____
UIN _____	SIGNATURE _____
FINAL APPROVER - SUB	
NAME _____	_____
UIN _____	SIGNATURE _____

FOUR/FIVE LETTER CODE - the four or five digit department code, not the department name (i.e. ACCT)

SUBDEPT CODE - the four or five digit subdepartment code; not subdept name (i.e. RES1)

Please be sure the department-subdept correspond with FAMIS. We will need a separate form for each subdepartment

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CONTACT PERSON-a person we can contact with questions concerning this form

APPROVER#1 (optional)- the person you want as first approver in the routing path of document; this person will be the stop prior to the final approver.

FINAL APPROVER - the person you want as final approver in the routing path of document

Email completed form to famis.security@tamucc.edu or fax to ext 5925.

****This form is only needed if you want to follow different routing than your travel Concur Travel path****

This form establishes the routing path for all PCard transactions for a department.

This will go live in FY19.

<http://comptroller.tamucc.edu/accounting/assets/PCARD%20CONCUR%20ROUTING%20FORM.PDF>

Transfer Departmental Property

TEXAS A&M UNIVERSITY-CORPUS CHRISTI
TRANSFER DEPARTMENTAL PROPERTY (TDP) APPROVAL AUTHORIZATION FORM

FOUR/FIVE LETTER DEPT CODE: _____ DATE: _____

SUB DEPT CODE: _____

RESPONSIBLE PERSON: _____ UIN: _____
(s/b listed as approver below)

CONTACT PERSON: _____ EXT: _____

Part A

Do you want the TDP routing to follow your normal department routing and approval paths?

Yes

If yes, please skip Part B and sign bottom of form.

No

If no, please continue to Part B.

Part B

APPROVER #1 (optional-fill in if a stop is needed prior to final approver)

NAME _____

UIN _____

SIGNATURE _____

APPROVER #1 - SUB

NAME _____

UIN _____

SIGNATURE _____

FINAL APPROVER (ONLY STOP OR FINAL STOP TO APPROVER #1)

NAME _____

UIN _____

SIGNATURE _____

FINAL APPROVER - SUB

NAME _____

UIN _____

SIGNATURE _____

**Your signature on the line below authorizes the routing in FAMIS to be as stated above.
Please sign to acknowledge your department's TDP routing and approval path.

Signature of Accountable Property Manager

Dept Code

Date

The TDP form establishes the routing for whole assets to be transferred out of the departments inventory.

<http://contracts.tamucc.edu/assets/TDP%20APPROVAL%20AUTHORIZATION%20FORM1.pdf>

Primary vs. Substitute

TEXAS A & M UNIVERSITY-CORPUS CHRISTI DEPARTMENT SIGNATURE CARD

Date: Department Name: Famis Department Code:

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Each Department will need to decide if the Names below will be a **Primary Signature (P)** or will service as a **Substitute (S)** for the Primary Signer. Signer must have active FAMIS/Canopy access and provide their FAMIS ID as indicated below. **If additional space is needed, please use the second page.**

(Check boxes below as appropriate)

Name/Job Title Must include the Department Head	Signer FAMIS/Canopy ID (xxxx15p)	Signature	Islanderbuy Purchasing	Manual Payments	Payroll	Budget (DBR)	FAMIS (DCR)
Department Head			Yes	P	P	P	P
			Pick One	Pick One	Pick One	Pick One	Pick One
			Pick One	Pick One	Pick One	Pick One	Pick One
			Pick One	Pick One	Pick One	Pick One	Pick One

Will the Responsible Person listed on the current departmental accounts need to be changed? Yes No. If yes, please provide us a UIN for the responsible person

LEGEND:
FAMIS/Purchasing: Requisitions and E's; DCR's

Department Head Printed Name /Job Title

Manual Payments: Voucher Creates, Petty Cash Forms, Travel Vouchers
Payroll: E** documents
Budget: DBR's

Department Head Signature

PLEASE FORWARD COMPLETED SIGNATURE CARD TO FAMIS Security (UNIT 5737) FOR PROCESSING. (Updated: 06/20/18)

Primary signer - The document is going directly to that person, who has been specified as the primary signer for the department and automatically receive notifications that they have documents pending
NOTE – IslanderBuy does not recognize Primary/Substitute

Substitute signer – The sub can go into the Primary Signer's box and sign for them, but they do not automatically receive notifications*

Famis Screens - Routing Screens for Dept. Paths

Screen 860 – Dept. Table Maintenance

How to look up 4/5 letter department code

Information needed to view routing path on Screen 921

Screen 921 – Dept. Paths Create/Modify

Different types of routing paths

View names on the desks in the routing path

Screen 860 provides the Office and the View names to use on screen 921. Once 921 has the office and the view, the routing for a department may be reviewed.

Screen 860 Dept. Table Maintenance

Not Sure of your 4/5 digit Department Code? Place an * beside Department and hit enter.

F8209 Field marked is required
860 Department Table Maintenance

01/11/17 15:27
CC 15

```
Screen: ___ Department: * ___ Sub Dept: ___
  Dept Name: _____
  Head/Director ID: _____ PH: _____
  Alt APO ID: _____ PH: _____
  Reporting ID: _____ PH: _____
  IPay IDT Email/ID: _____
  Mail Code: _____ College Dept: _____ Off Campus Flag: ___
  Exec Level: ___ Division: ___ School/College: ___
  Building Campus: ___ Room: _____ Group Cd: _____
  Building Number: _____ Other Loc: _____
  Budget Sort Dept Nbr: _____ Approx. Inv. Count: _____ FFX Cert. Month: ___
  Allow Flags: FRS: ___ EPA: ___ DBR: ___ DCR: ___ FFX: ___ TDP: ___ Purch: ___
  eProc: ___ eBill: ___ eShip: ___ eSufx: ___ eDaPriv: ___ Surplus: ___
  Maestro: Org Unit: _____ Parent Dept: _____ Center/Institute: ___
  Mail to Dept Head: ___ USAS Cd: ___
  Other Part Nbr: ___ Dept Office: _____ General Comments:
  Other Part Dept: _____ Dept View: _____ Hit <PF10>
  Other Part Sub Dept: _____ Exec Office: _____ FFX Comments:
  Dept Expiration Date: _____ Exec View: _____ Hit <PF11>
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help EHelp                      Audit          Dload GenCm FFXCm
```

List all the Departments

```
F8209 Field marked is required
860 +-----+
      F2202 Mark field with an "X" to select
Scr  Screen:  ___ Search:  █ Type:  N Exp Only:  N (Y,N)
      Include FRS:  Y (Y,N) FFX:  N (Y,N)
H
      Sel Dept Sub
      Dept Department Name FRS FFX
IP  - ACADV ACADEMIC ADVISING Y Y
      - AATC ACADEMIC ADVISING/TRANSITION CENTER Y Y
      - AAAMP ACADEMIC AFFAIRS ASSOCIATE VP Y Y
      - AAPRV ACADEMIC AFFAIRS PROGRAM REVIEW Y Y
      - ACAD COMM ACADEMIC AFFAIRS- COMMENCEMENT Y Y
      - ACAD ACADEMIC AFFAIRS-PROVOST Y Y
Budge - ACAD RES1 ACADEMIC AFFAIRS-PROVOST Y Y
AI - ACFA ACADEMIC FISCAL AFFAIRS Y Y
      - ATS NWRK ACADEMIC INFORMATION TECH SUPPT-NEWK/SVC Y Y
Ma - ACAD1 ACADEMIC POLICY & INSTITUTIONAL EFFECTIV Y Y
      - ACCT RES1 ACCOUNTING Y Y
      - ACCT ACCOUNTING SERVICES Y Y
      - ATS ADCO ADMIN COMPUTING Y Y
      ** More Entries **
      ** Press <PF4> to Quit **
Othe
Dept
Enter
```

Hit enter to see more screens if the dept. you are searching for does not appear.

Place an X beside the department to select and hit enter or Press F4 to exit pop up.

Screen 860 Dept. Table Maintenance

You can also search for a department code – by first letter in the department name.

```
F8209 Field marked is required
860 +-----+
      F2202 Mark field with an "X" to select
Scr  Screen:  ___ Search: C_____ Type: N   Exp Only: N (Y,N)
                                Include FRS: Y (Y,N) FFX: N (Y,N)
      H
      Sel Dept Sub
      Dept Department Name FRS FFX
      IP  - CRCL
          - CRCL RES1 CAREER PLANNING & PLACEMENT Y Y
          - CRCL RES1 CAREER SERVICES - GRANTS Y Y
          - CTCS RES2 CENTER COASTAL STUDIES-RESEARCH DEVELOPM Y Y
          - LRNC
          - LRNC CENTER FOR ACADEMIC STUDENT ACHIEVEMENT Y Y
          - CASA2
          - CASA2 RES1 CENTER FOR ACADEMIC STUDENT ACHIEVEMENT Y Y
      Budge - CAAS
      AI     - CAAS CENTER FOR ATHLETIC ACADEMIC SERVICES Y Y
          - CTCS
          - CTCS RES3 CENTER FOR COASTAL STUDIES Y Y
      Ma     - CTCS RES1 CENTER FOR COASTAL STUDIES-GRANTS Y Y
          - CTE
          - CTE CENTER FOR FACULTY EXCELLENCE Y Y
          - CTS
          - CTS CLASSROOM TECHNOLOGY SUPPORT Y Y
          - CMAR
          - CMAR CLEARINGHOUSE FOR MEXICAN-AM RESEARCH Y Y
      Othe
      Dept
      Enter
          ** More Entries **
          ** Press <PF4> to Quit **
```

Screen 860 Dept. Table Maintenance

F0013 Please enter desired modifications

860 Department Table Maintenance

01/11/17 16:02

CC 15

Screen: ___ Department: ACCT_ Sub Dept: _____

Dept Name: ACCOUNTING SERVICES_____

Head/Director ID: CASTORENA, YOLANDA PH: 361-825-5571

Alt APO ID: POLLARD, RUBY PH: 361-825-5620

Reporting ID: _____ PH: _____

IPay IDT Email/ID: _____

Mail Code: _____ College Dept: _____ Off Campus Flag: N

Exec Level: FA Division: CO School/College: ___

Building Campus: 15 Room: 229___ Group Cd: TAMUP

Building Number: 00125 Other Loc: _____

Budget Sort Dept Nbr: _____ Approx. Inv. Count: _____ FFX Cert. Month: ___

Allow Flags: FRS: Y EPA: Y DBR: Y DCR: Y FFX: Y TDP: _ Purch: Y

eProc: B eBill: ___ eShip: ___ eSufx: B_ eDaPriv: _ Surplus: _

Maestro: Org Unit: 16456_____ Parent Dept: COMP_ Center/Institute: ___

Accounting Services Mail to Dept Head: _ USAS Cd: ___

Other Part Nbr: ___ Dept Office: ACCOUNTING General Comments: N

Other Part Dept: _____ Dept View: ACCOUNTING Hit <PF10>

Other Part Sub Dept: _____ Exec Office: FFX Comments: N

Dept Expiration Date: _____ Exec View: Hit <PF11>

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help EHelp

Audit

Dload GenCm FFXCm

The Office and View are used to populate screen 921.

Famis Tool Options: Reset Settings in Famis to copy and paste

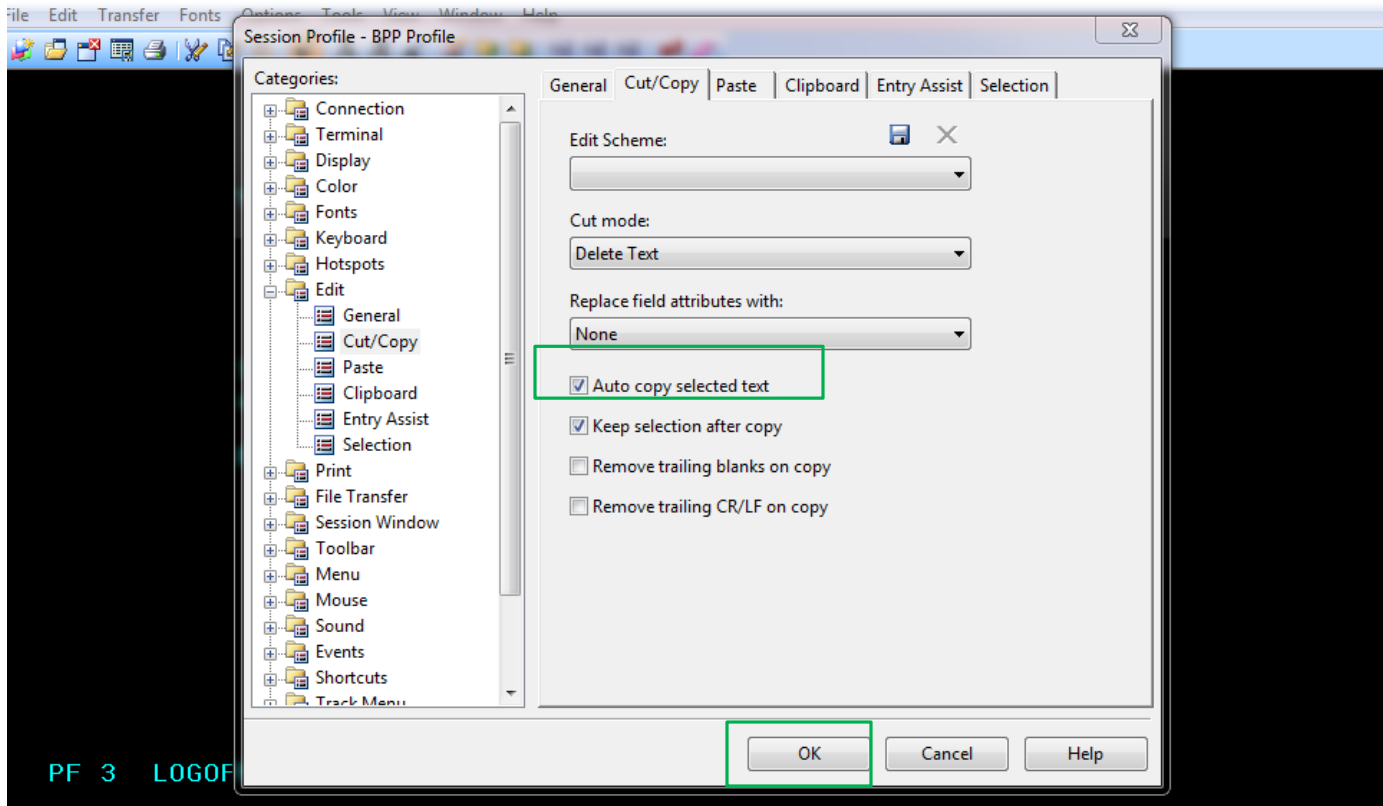


```
001 FRS Main Menu                                01/11/17 16:27
                                                FY 2017 CC 15
Screen: █ Account: 220212 1610                FAMIS APPLICATION
Active Processing Month: 1 January
* ---- Financial Accounting ---- *
M01 Account Information
M02 FA Transactions
M03 Inquiry - Dollar Information
M05 Support Account Inquiry
M06 Support Account Maintenance
M07 Departmental Planning Budgets
M08 Entire Connection Download
M09 Entire Connection Print
M52 Departmental Budget Requests
* ----- Accounts Payable ----- *
M10 Accounts Payable System Menu
M21 Vendor Information Menu
* ----- Accounts Receivable ---- *
M61 Accounts Receivable
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp                               Pers SOR
* ----- Purchasing ----- *
M20 Purchasing System Menu
* ---- Routing and Approval ---- *
M90 Routing and Approval Menu
* ----- Payroll ----- *
M70 Payroll System Menu
* ----- Other Menus ----- *
M58 Budget Preparation Module
B01 Bulletin Board News Menu
S01 FA/AP System Tables
S02 Miscellaneous Tables
S03 Miscellaneous Tables Continued
AFR Annual Financial Reporting
FFX Fixed Assets Module
GCP General Construction Projects
SPR Sponsored Research Module
```

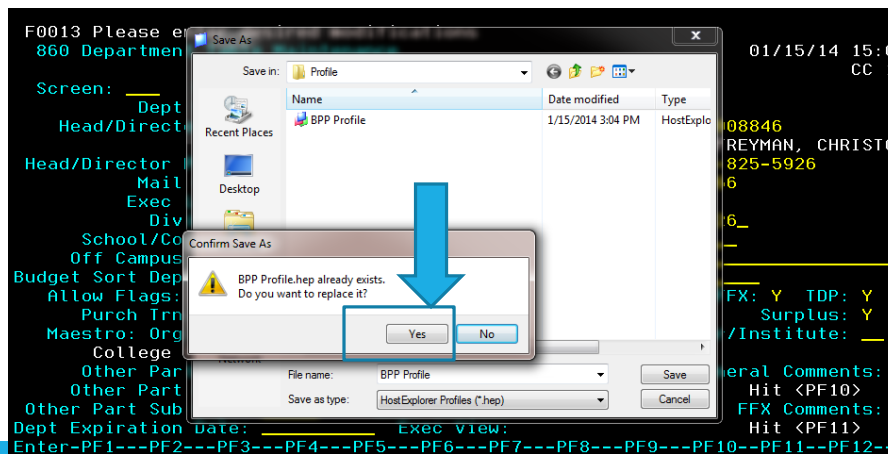
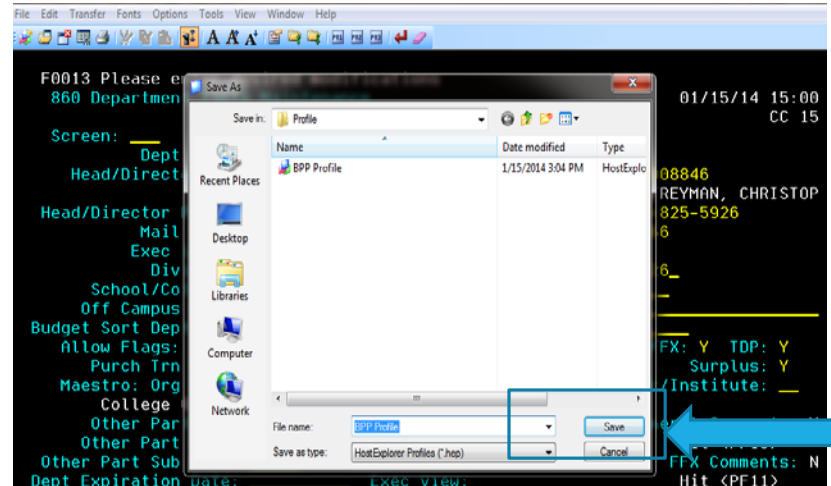
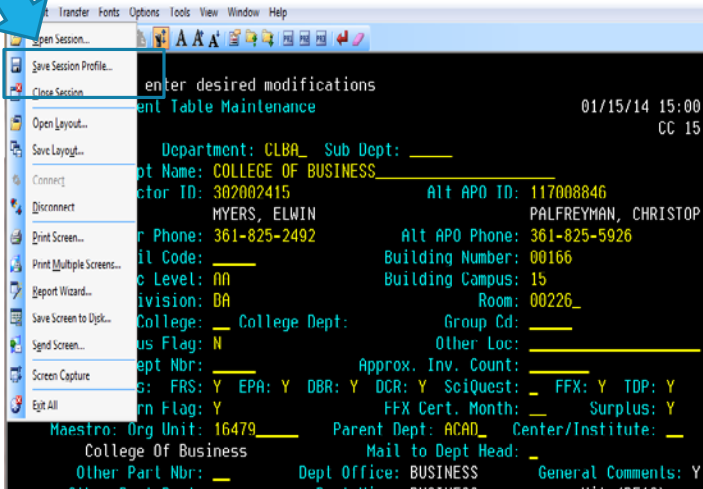
Select Edit,
A menu box will drop
Down and choose
Options.

The Options box will open,

Check the box “Auto Copy Selected Text”, then “OK” to save..



Select File on Menu line. A drop down menu will appear and select "Save Session Profile". A Save As Box will appear, do not change anything, just "Save". It will say that it already exists and do you want to replace it? Select Yes.



Be sure to select "Yes" to replace.

Screen 921Dept Paths Create/Modify

```
F8209 Field marked is required
921 Dept Paths Create/Modify
06/19/18 11:46
CC 15

Screen: ___ Office: accounting View: _____

Description: _____
Office Mgr :

F Form Dept/Sub Category
N                                     Status and Desks
-----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----
- --- -----

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help EHelp                               Names
```

The Office name and View name usually are the same so hit enter. Even if names are not the same hit enter.

921 Dept. Paths

F3003 Security - You may not update on this screen
 921 Dept Paths Create/Modify

01/12/17 13:41
 CC 15

Screen: ___ Office: ACCOUNTING View: ACCOUNTING

Description: ACCOUNTING_____
 Office Mgr : TORRES, REBECCA C

F	Form	Dept/Sub	Category	Status and Desks
N				
-	*__	*_____	_____	SIGNER DSK
-	*__	ACCT RES1_	_____	SIGNER DSK
-	DBR	*_____	C&G_____	SIGNER DBR
-	DT*	*_____	_____	SIGNER DT*
-	E**	*_____	_____	SIGNER E**

*** End of list ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
 Hmenu Help EHelp Names

- * - Purchasing Documents/Wildcard Path
- DBR – Departmental Budget Request
- DCR – Departmental Correction Request

- DT* – Concur Routing
- E** - Payroll documents

921 Dept. Path

Forms on screen 921

Each line on screen 921 is a path for a form with up to 4 stops allowed before going to the final signer. By placing your cursor on the line under forms and pressing F2, a list will pop up to show all forms. Not all forms will be utilized by your department. If you have questions about the use of other forms, please contact Famis Security at Famis.Security@tamucc.edu.

```
F0013 Please enter desired modifications
921 Dept Paths Create/Modify                                06/20/18 13:30
                                                            CC 15

Screen +-----+
Descr | More entries - select or press <ENTER> to scroll
Offic | Search Criteria: 
-----+-----+

F  Fo   Select  Form      Description      Processing Unit  Category
N  --   ---      DBR      DEPT BUD REQ    DBR OFFICE      AM
-  --   ---      DCR      DEPT CORRECT    DCR OFFICE      AM
-  *_   ---      DTR      DEPT REQUEST
-  DB   ---      DTV      DEPT TRAVEL
-  DB   ---      EBR      BUDGET EPA      PAYROLL
-  DB   ---      ECT      PAYROLL TRAN    ECT OFFICE
-  C    ---      EGR      GRAD EPA        PAYROLL
-  C    ---      EWR      WAGE EPA        PAYROLL
-  DT   ---      PBD      BIDS            PURC
-  DT   ---      PEP      EXEMPT PURCH    NER DSK
-  E*   ---      PIP      INVOICE PROB    FISC
-----+-----+
NER DSK
NER DBR
NER DCR
NER DSK
NER E**

*** End of list ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Hmenu Help  EHelp                               Names
```



921 Dept. Paths

F3003 Security - You may not update on this screen

921 Dept Paths Create/Modify

01/12/17 14:39

CC 15

Screen: █ Office: BUSINESS__ View: BUSINESS__

Description: COLLEGE OF BUSINESS_____

Office Mgr : MORENO, IDA D

F	Form	Dept/Sub	Category	Status and Desks	
N					
-	---	-----	-----	-----	
-	*__	*_____	_____	SIGNER DSK	
-	*__	CLBA RES4_	_____	SIGNER DSK	
		C&G_____	_____	SIGNER DSK	
-	DBR	*_____	_____	SIGNER DBR	
-	DBR	CLBA RES1_	_____	SIGNER DBR	
		C&G_____	_____	SIGNER DBR	
-	DBR	CLBA RES2_	_____	SIGNER DBR	
		RESAPPR1_	RESAPPR2_	RES2_____	SIGNER DBR

*** Press <ENTER> to view more entries ***

nter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help EHelp

Names

Approver Desks

Not final signers

Stops requested by department before the final signer

Only 1 intermediate stop allowed in IslanderBuy

If you are interested in additional routing stops, contact Famis Security to discuss options.

921 Dept. Paths

```
1 - Default 3270 (tammvs1.tamu.edu)
File Edit Transfer Fonts Options Tools View Window Help

F3003 Security - You may not update on this screen
921 Dept Paths Create/Modify                                03/05/13 18:22
                                                            CC 15

Screen: ___ Office: ADV SVCS__ View: ADVSVCS__

Description: ADVANCEMENT SERVICES_____
Office Mgr : FUNK BAXTER, KATHRYN

F Form Dept/Sub Category
N                                     Status and Desks
-----
- * _ * _____
- DBR * _____
- DCR * _____
- DTY * _____
-   _ CTE APPRYR _ _____
- E** * _____

*** End of list ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Hmenu Help EHelp Names

1 | Sess-1 | 128.194.103.18 | | | TAMT2870 | | |
```

Signer Desks

Final signers

These are the names
Submitted on the
Department
Signatures cards.



921 Dept. Paths

F0013 Please enter desired modifications

921 Dept Paths Create/Modify

01/12/17 14:44

CC 15

Screen: █ Office: BUSINESS View: BUSINESS

Description: COLLEGE OF BUSINESS

Office Mgr : MORENO, IDA D

F	Form	Dept/Sub	Category	Status and Desks
-	DBR	CLBA RES3		
-		RESAPPR1	RESAPPR2	RES3
-	DCR	*		SIGNER DBR
-	DT*	*		SIGNER DCR
-	DT*	CLBA RES1	CTE APPRVR	SIGNER DT*
-	DT*	CLBA RES3	CTE APPRVR C&G	SIGNER DT*
-		RESAPPR1	RESAPPR2	CTE APPRVR RES3

*** Press <ENTER> to view more entries ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---

Hmenu Help EHelp

Names

To view name
on desk(s)

Place cursor
anywhere on
"CTE APPRVR" or
"SIGNER
DESK" and press
F7 function key.
Can only do one
desk at a time.

Screen 921 - Approver Desk

```
F0013 Please enter desired modifications
921 Dept Paths Create/Modify                                01/15/14 14:08
                                                            CC 15

Screen: ___ Office: BUSINESS__ View: BUSINESS__

Descrip +-----+
Office  |
+-----+
F Form  | DESK: CTE APPRVR
N       |
- ---  |
- DBR   |          PID      STATUS   NAME
- DT*   |
- DT*   |
- DT*   |
- E**   |
+-----+
*** END OF LIST - 2 WORKERS FOUND
PF4 to Quit

*** +-----+
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                               Names
```

Minimum of 2 names on a desk: P & S – in case primary approver is not able to approve document the Sub can approve or in case one person leaves the University suddenly the other person can go in and approve. Document can continue on path to signer. To exit press F4 function key.

Screen 921 Signer Desk

```

F3003 Security - You may not update on this screen
921 Dept Paths Create/Modify                                01/11/17 15:26
                                                            CC 15

Screen:  ___ Office: ACCOUNTING  View: ACCOUNTING

Descrip +-----+
Office  |
+-----+
F Form  |  DESK: SIGNER DSK
N       |
- ---  |
- *___  |           PID       STATUS    NAME
- *___  |           S           TORRES, REBECCA C
-       |           S           CASTORENA, YOLANDA
- DBR   |
- DT*   |
- E**   |
+-----+
*** END OF LIST - 3 WORKERS FOUND
PF4 to Quit

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                        Names

```

Can view the same way as you view an approver desk – by hitting F7. Minimum of 2 signers. Press F4 function key to exit.

Canopy Routing

Under the Routing tab, check on a documents status in your outbox.



EPA FFX FRS Routing System

Main Menu > Routing > Outbox

Inbox Enroute **Outbox** Document Global Queue User Profile

Document: Substitute: My Inbox Search for Substitute: Search

Approval Only: Yes No Manual Only: Yes No

Submit

INBOX CONTENT (TOTAL ITEMS: 13) DEFAULT VIEW

Document	Action	Status	Arrival Date	Summary	Account	Total	Creator	Create Date	Quick Action
DCR15J700215	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700216	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700217	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700218	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700219	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700220	Approve	In Proc Rt	12/23/2016	account correction	*see doc*	\$0.00	Amaya Villeda, Kevin R	12/13/2016	Approve
DCR15J700230	Approve	In Proc Rt	01/02/2017	Grad Telecom Expense	*see doc*	\$0.00	Casey, Mary Louis E	01/02/2017	Approve
DCR15J700233	Approve	In Proc Rt	01/02/2017	Move from 320180 to 320160	*see doc*	\$0.00	Wilson, Noelle	01/02/2017	Approve
DCR15J700232	Approve	In Proc Rt	01/02/2017	Move from 320180 to 320160	*see doc*	\$0.00	Wilson, Noelle	01/02/2017	Approve
DCR15J700231	Approve	In Proc Rt	01/04/2017	Correct acct from 207322 to 207323	*see doc*	\$0.00	Rhyne, Dana L	01/02/2017	Approve
DCR15J700242	Approve	In Proc Rt	01/10/2017	To correct object code	*see doc*	\$0.00	Peralta, Cynthia M	01/06/2017	Approve
DCR15J700240	Approve	In Proc Rt	01/10/2017	To correct object code	*see doc*	\$0.00	Peralta, Cynthia M	01/06/2017	Approve
DCR15J700253	Approve	In Proc Rt	01/12/2017	correct 2702408	*see doc*	\$0.00	Chamberlain, Irene C	01/12/2017	Approve

prev 1 next Page: 1 of 1 Go Page size: 13 Change (Showing page 1 of 1, items 1-13) Total items: 13

Canopy Routing Status

DOCUMENT NOTES							
Text							
>>Note entered 12/12/16 by KUKLINSKI, ZAVA signage incorrectly coded as advertising							
ROUTING NOTES							
There are no Routing notes for this document.							
Add Notes							
DOCUMENT HISTORY							
Desk	Fwd Name	Office	Date	Name	Phone	Action	
CREATE DSK			12/12/2016 10:29:15 AM	Kuklinski, Zava E	361-825-5947	Submitted	
SIGNER DCR	Longoria, Elizabeth A	15-ARTSHUM	12/12/2016 10:29:16 AM	Kuklinski, Zava E	361-825-5947	Forward/FYI	
SIGNER DCR		15-ARTSHUM	12/14/2016 4:11:21 PM	Geyer, Janis K	361-825-6044	Signed	
DCR OFFICE		15-DCR OFFICE	12/14/2016 4:30:37 PM	Hall, Dustin R	361-825-5874	Approved	
PASS-THRU		15-DCR OFFICE	12/14/2016 4:30:37 PM	Famis, Special		Approved	
			12/20/2016 8:54:15 AM	Kuklinski, Zava E	361-825-5947	Discarded	
CURRENT LOCATION							
No records found to display.							
DOCUMENT PATH (PENDING)							
No records found to display.							
DEPT ROUTING							
Desk	Fwd Name	Office	Date	Name	Dept	Action	
		ARTSHUM		College Of Liberal Arts	15-ARTS	Routing Completed	
DOCUMENT HELD BY							

After clicking on the document, scroll down to see the entire routing history and status of the document.

Frequent Routing Issues

- Signature Card Changes – If you know of changes to departmental routing in advance, begin the process of filling out the new form and getting the required signatures to avoid delays in changing the routing. Once you need the changes to take effect, send the completed form to Accounting Services.
- Signature Card – Department Heads must be in a departments routing.
- Completing Signature Cards – Leaving fields blank on the signature card will slow the process of making the changes to the departments routing.

IslanderBuy Routing – Our new procurement application

Department Allocator – Represents Requisition Creators (those who create Reqs in FAMIS). The user ensures the correct account number & object code are set for the document prior to its routing path.

Intermediate Approver – For departments with routing stops prior to the final signer, this path will be set up. NOTE – Only 1 routing box is available for the intermediate approver, so if you currently have more than 1 intermediate approver boxes in your FAMIS routing, you will need to coordinate with FAMIS Security to select the users for this role.

Final Approver – This is set by your department signature card. Updates to the final signer in IslanderBuy will require an updated department signature card.



Review of Available Resources

Website <http://comptroller.tamucc.edu/accounting/>

Email - All forms – Famis.Security@tamucc.edu

Online Forms-

- Department Signature Cards http://comptroller.tamucc.edu/accounting/online_forms.html
- Concur Signature Card – (eTravel Expense Report Authorization Form) –
- <http://comptroller.tamucc.edu/accounting/assets/CONCUR%20ROUTING%20APPROVAL%20FORM.pdf>
- Concur Signature Card – (Pcard)
- <http://comptroller.tamucc.edu/accounting/assets/PCARD%20CONCUR%20ROUTING%20FORM.PDF>
- Transfer of Departmental Property Form –
- <http://contracts.tamucc.edu/assets/TDP%20APPROVAL%20AUTHORIZATION%20FORM1.pdf>

Questions?

