DE 232: Introduction to *DEFINE
## Contents

**CHAPTER I - Basics**

- What is *DEFINE? .......................................................... 3
- What is *DEFINE used for? ............................................. 3
- What is needed to access *DEFINE? .................................. 3
- How to Log in to *DEFINE ............................................ 4
- Commands ........................................................................ 4
- Help and Tutorials .......................................................... 4
- How to Exit *DEFINE .................................................... 5

**CHAPTER II - Intermediate**

- Authorizations .............................................................. 5
- Desks .............................................................................. 6
- Authorization Views ....................................................... 6
- Command Authorizations ............................................... 6
- Check or Change Linked Desk/View .................................. 6
- Command and Document Screen Organization .................. 7

**CHAPTER III – Advanced (Tips and Tricks)**

- Navigation ....................................................................... 9
- Question Mark (?) .......................................................... 10
- PF1 - View Available Commands/Options .......................... 10
- Change Desk/View .......................................................... 10
- PF11 - Personal Note Pad Page ........................................ 11

**Profiles**

- YP1 – Personal ‘Start-up’ Profile ...................................... 11
- YP2 – Personal Profile for *DEFINE Modules .................... 11
- YP3 – Document Approval Confirmation ............................ 11
- YB2 – Electronic Document Inbox ...................................... 11

**Glossary**

  12
CHAPTER I - Basics

What is *DEFINE?

*DEFINE is the DEpartmental Financial Information NEtwork accessed through The University of Texas at Austin’s mainframe computer. Though primarily used to perform financial transactions, *DEFINE is a powerful software tool that can be used for a variety of different purposes.

What is *DEFINE used for?

*DEFINE is a sophisticated accounting and departmental record keeping system, which enables detailed coding of transactions, report generation, and electronic reconciliation. *DEFINE also allows users to:

- Create electronic documents
- View accounting transactions
- View account balances
- Update electronic signature authorization
- Maintain departmental contacts

What is needed to access *DEFINE?

- University employment
- QWS3270 Mainframe Software
- UT EID
- Mainframe Logon ID

Any university employee with a mainframe logon ID has access to *DEFINE and is automatically on a PUBLIC desk that allows several commands to be viewed. To use more commands, a user must be assigned to a desk in an electronic office with the required command authorizations. Office managers and delegates manage authorizations for their electronic office. See the Authorizations section for more details.
How to Log in to *DEFINE

1. Open QWS3270 software
   If the computer does not have this software installed, contact the department’s IT team or the ITS help desk (512-475-9400) for information about installing the QWS3270 software.

2. Type FI or ST and press Enter
   A department contact assigns a mainframe logon ID with FI or ST (or both) access to the mainframe. Contact the department contact or supervisor to find out which one to use.

3. In the UT EID and Password fields, type the UT EID and password and press Enter

4. From the Last valid logon screen press Enter

5. From the COM-PASS screen just below the Enter Input field, type D, define, or *DEFINE and press Enter

6. In the Command field, type the menu option or command and press Enter

Commands

*DEFINE is divided into operations called commands. These are three-character codes that tell the computer to perform a particular activity. Commands are organized into various categories known as menus and modules used for navigating within *DEFINE:

- Main Menu – MMM
- Area Menus (Modules) – AMM, BMM, etc.
- Area Submenus – VPM, VTM, etc.
- Working Screens (often referred to as commands)

Help and Tutorials

HMM Menu

A help menu is available in *DEFINE that contains information about how to use *DEFINE. The HMM command displays the HHM and HDM modules.

- HH1 - Introduction to *DEFINE
- HH2 - Introduction to Electronic Documents
- HH3 - used for troubleshooting error messages. If an error message appears in the message line of a document, go to
the HH3 command to see if an article is available that explains how to resolve the error.

Other commonly used screens include:

- HH7 – To re-read the “Good Morning” screen.
- HD1 – To see detailed information about a specific unit code.
- HD2 – To see information about a specific account number.
- HD6 – To see a list of all the documents that have been created.

How to Exit *DEFINE

To leave the current *DEFINE command screen without exiting the *DEFINE application, press PF7 to return to the *DEFINE MMM menu.

To exit *DEFINE but remain on the mainframe, press PF8.

To end a mainframe session, on the COM-PASS screen just below the Enter Input field, type U and press Enter.

CHAPTER II - Intermediate

Authorizations

In *DEFINE, authorizations are controlled by desk and authorization view combinations. A desk is a group of employees. An authorization view is a group of units or accounts.

*DEFINE is a public University of Texas at Austin application, which means that anyone with a mainframe logon ID can access it. As long as you can logon to the mainframe computer, you can access *DEFINE. All users with a mainframe logon ID are authorized for certain *DEFINE commands using the PUBLIC desk and PUBLIC authorization view.

The PUBLIC desk consists of all *DEFINE users. The PUBLIC authorization view does not contain any accounts. To access account information and more *DEFINE commands, users must be assigned to a desk in an electronic office that is linked to an authorization view that contains accounts. Users must contact the
Users can view all their available linked desk/view combinations on the *DEFINE YS1 command. This command is also used for viewing the command authorizations assigned for each desk/view combination and allows users to switch from one desk/view to another.

Desks

A desk is a group of university employees who share a common administrative function within a particular department, such as creating travel authorization requests or payment vouchers.

Desks used in account-based routing have access to units and/or accounts in order to process documents. Desks in nonaccount-based routing do not need to be linked to an authorization view or be granted command authorizations.

Authorization Views

An authorization view is a unique group of units and/or accounts within an electronic office. Authorization views allow office managers and delegates to control what accounts can be used by different groups of users and for different purposes.

Command Authorizations

Commands are three-character abbreviations that represent electronic documents and other features of *DEFINE. Electronic office managers and delegates use command authorizations to control the access individuals have to use an authorization view (units and accounts) on a particular command. Individuals on a desk are limited to the actions and commands that the linked desk/view has been given authorizations for.

Check or Change Linked Desk/View

To change the linked desk/view currently being used in *DEFINE, complete the steps below:

1. In the Command field, type YS1 and press Enter.
2. In the **Select a Desk and View by Number** field, type the number next to the desk/view from the list displayed on the screen.
3. In the **Select an Action** field, type `S` and press Enter.
4. The following message appears on the screen: New view and desk successfully selected.

To see what linked desk/view is currently being used, press the PF1 key from any command screen in *DEFINE*. A popup window opens that displays the current desk/view.

**Command and Document Screen Organization**

Screens in *DEFINE* are divided into three sections.

**Section 1: Command Line**

The top three to four lines of a screen. This section of the screen changes very little from one command to the next.

**Message Line**

The top line, usually blank, is known as the Message Line and is where success or error messages appear.

**Application**

*DEFINE is displayed as the application currently being used. To change the application, type over “*DEFINE” with the name of another mainframe application to close *DEFINE and automatically open the new application.

**Command**

The name of the current command screen (e.g., MMM). Also referred to as the Command Title.

**Year**

By default, the current fiscal year is displayed. To view information for another fiscal year, type over the last two numbers of the first year of the fiscal year in the **Year** field.

**Command**

This field lists the command currently being used.

**Misc**

This field appears on most screens in *DEFINE and allows the user to search for available information or documents by account number, unit code, or other miscellaneous data.

**Month**
By default, the current month is displayed. To view information for another month, type the first three letters of the month in the Month field and press Enter.

Section 2: Body

The body is the central portion of the *DEFINE screen and is used to view information about specific topics or add information to electronic documents.

Fields
The *DEFINE screen is divided into specific areas called fields. Fields vary in length and serve many different purposes. Some fields are protected – users can’t type over existing information. Other fields are unprotected – users are able to enter information.

For any unprotected field in *DEFINE, type a question mark (?) in the first available space of the field and press Enter to see an explanation of the field or to see a list of available options.

Mark
A blank line which only holds one character. Type a particular character in the mark field to perform one of the following:

- Select an Option: Type a question mark (?) in any mark field to display the options available for that particular field.
- Display More Information: For example, on the GG3 command, type X in the mark field next to a vendor name to display more information about that vendor.
- Go to Another Screen: For example, on any GT command screen, type T in the mark field next to a transaction to go to the document that generated the transaction.
- Take Action: For example, on the ND1 command screen, type D in the mark field next to a record to delete the nonofficial inventory record.

Windows
Windows are used in *DEFINE to provide additional information screens without having to add a separate command. Some windows overlay (cover) the original screen completely. In those cases, the Command Line information is not displayed at the top of the screen. Other windows (usually referred to as pop-up windows) only cover some portion of the original screen. To close a pop-up window, press Clear or Enter.
Section 3: Footer

A footer is the bottom line of a screen.

Component Code
The left-hand side of the footer displays the Component Code currently being used. A zero (0) indicates *DEFINE for The University of Texas at Austin. To see all the codes for each UT component, type a question mark (?) in the mark field next to the component’s name and press Enter.

Options
In the center of the footer, two of the most commonly used PF keys are listed.
- PF1 displays a list of available PF commands or options
- PF8 exits *DEFINE

Date/Time
The right-hand side of the footer displays the current date and time
Note: The time shown is the last time the Enter key was pressed.

CHAPTER III – Advanced (Tips and Tricks)

Navigation

There are four different ways to navigate in *DEFINE without using a mouse:

1. The Tab key – used to move from one field to the next, sequentially
2. The Enter key – used to input information or to scroll through multiple screens in a series.
3. PF keys – used to perform different functions within the program. Press PF1 to see a list of PF key options available from the current screen. Some PF keys are specific to the current screen while others are the same on any screen in *DEFINE.
   a. PF1 – Options menu
   b. PF5 – Certain screens allow the user to customize information displayed (varies by command)
   c. PF6 – Help for the Current Screen
   d. PF7 – Return to the Main Menu
   e. PF8 – Exit *DEFINE
   f. PF10 – Command Experts/Glossary
4. The **Clear** key – used to exit a screen without changing any information. On PC keyboards, the **Clear** key is the **Pause/Break** key. On Macintosh keyboards, the **Clear** key is the **Num Lock/Clear** key.

**Question Mark (?)**

The question mark is a way to ask *DEFINE for more information. Type a question mark (?) in the first character of any field and press **Enter** to display the options available for that particular field.

**PF1 - View Available Commands/Options**

Press the PF1 key from any command in *DEFINE to view the current level of authorization for that particular command, as well as the linked desk/view that is currently being used. PF1 also lists any special PF keys available for that command screen. These keys vary from one command to the next. Finally, PF1 lists the standard PF keys available and their functions as described above.

**Change Desk/View**

*DEFINE provides two methods by which to change the current linked desk/view.

**Method 1:**
1. In the **Command** field, type **YS1** and press **Enter**.
2. In the **Select a Desk and View by Number** field, type the number next to the desk/view from the list displayed on the screen.
3. In the **Select an Action** field, type **S** and press **Enter**.

**Method 2:**
1. From any command in *DEFINE, press the **PF1** key.
2. In the first space of the **Desk** or **Administrative View** field, type a question mark (?) and Press **Enter**.
3. In the **Select a new Desk/View** field, type the number of the desk/view to use and press **Enter**.
PF11 - Personal Note Pad Page

Each command in *DEFINE has its own note pad page, which allows the user to save notes or other information about a command, a document, or error message. These notes are saved in *DEFINE and are only available to the user who entered them.

Profiles

YP1 – Personal ‘Start-up’ Profile

The optional YP1 start-up profiles allows a user to set predetermined values for a number of fields, which are automatically selected when the user logs in to *DEFINE. The user can select which desk, view, command, account number, or year to default to upon logging in.

YP2 – Personal Profile for *DEFINE Modules

The optional YP2 profile allows a user to designate a specific linked desk/view to be used with particular modules or commands (e.g., VMM, VT1). When the user goes to a command in the specified module for which the profile was created, the profiled desk/view is automatically selected for the user. Up to twelve linked desks/views can be profiled.

YP3 – Document Approval Confirmation

For users who approve large numbers of documents, the optional YP3 command can help save time. This command allows the user to decide whether or not a confirmation window should pop up each time a document is APPROved.

YB2 – Electronic Document Inbox

Users can choose one of seven information views to display on the YB2 command. The PF5 key allows a user to profile the YB2 inbox.
and choose, for example, which forms, fiscal year, creator, and desk to default to.

Glossary

Account
A 10-digit number used for recording accounting transactions. Account numbers are set up by the Office of Accounting. Each account number is unique and represents a unique set of funds.

Authorization (Admin) View
A group of units and/or accounts that allow office managers and delegates to control what accounts users can view and/or update.

Budget Group
A group of related accounts with the same first eight digits in the account number. Budget groups are assigned to the units responsible for administering the funds.

Command
A three-character abbreviation that represents an electronic form (document) or functions provided by administrative offices.

Command Authorizations
Used to control which commands individuals can access. Command authorizations are granted to a linked desk/view.

Command Status
The level of authorization granted to a linked desk/view. There are four statuses:

- None: cannot access the command
- View: can view command information only
- Update: can use the command; required to create and process electronic forms (documents)
- Super: same permissions as update; grants additional authorizations for certain commands

Desk
A group of university employees with a shared responsibility. Desks used in account-based routing have access to units and/or accounts in order to process documents. Desks in nonaccount-based routing do not need to be linked to an authorization view or be granted command authorizations.

Electronic Document
An electronic version of a manual (paper) document used for a variety of tasks.

Electronic Office Manager
The primary individual responsible for maintaining an electronic office (e.g., setting up document routing, controlling electronic signature authorizations, granting command authorizations).

Mainframe
A large, high-speed computer, especially one supporting numerous workstations or peripherals. *DEFINE is one of the many applications which run on the university’s mainframe.

Mainframe Logon ID
A four- or five-letter identifier beginning with the user’s departmental prefix. This identifier is used by the mainframe to distinguish an individual.
Module
A *DEFINE Module is a group of menu screens or a group of commands, which share common features, for example, all vouchers are part of the same (VMM) module.

Subaccount
The last two digits of an account number used to divide a budget group into categories, such as salaries, equipment, scholarships, or other expenses.

Unit
An official university department, organization (official unit), project, program, or principal investigator (subunit). Each unit is represented by a seven-digit unit code.

Funding Unit
A unit that has accounts associated with it. A funding unit may also be an organizational unit.

Official Unit
An official academic or administrative university entity. Unit codes of official units end in “-000.” Official units may be divided into subunits, which report to the official unit.

Organizational Unit
An official academic or administrative university entity in the university’s organizational hierarchy. An organizational unit may also be a funding unit.

Processing Unit
A unit that final approves a document after the document has received all departmental approvals. Each document type is routed to a processing unit. Examples of processing units include Accounts Payable, Budget, and Payroll.

Subunit
A subdivision of an official unit. A subunit’s code ends in a non-zero number between “-001” and “-999.” While official units represent official academic or administrative university entities, subunits are established to allow for more granular control over funds or workflow within the official unit. Subunits are typically associated with individuals (principal investigators), programs, or projects.

Unit Code
The seven-digit code assigned to a unit. The first four digits represent the official unit; the last three digits represent subunits within the official unit.

UT EID
The University of Texas electronic identifier. A UT EID allows anyone with a relationship to the university to use restricted online applications if the user is provided the appropriate command authorizations.