DE 525: Introduction to Electronic Office Management
CHAPTER I - Basics

- Electronic Office Management
- The Electronic Office
- The Electronic Office Manager
- The Delegate
- Desks
- Authorization Views
- Command Authorizations
- Routing Views
- Document Routing
- Electronic Signature Authorization

CHAPTER II - Managing the Electronic Office

- Moving a Unit into an Electronic Office
- Creating an Authorization View
- Moving a Unit or Account into an Authorization View
- Creating a Desk
- Assigning People to a Desk
- Linking a Desk to an Authorization View
- Command Authorizations
- Creating a Routing View
- Creating a Routing Sequence
- Moving a Unit or Account into a Routing View
- Updating Electronic Signature Authorizations

Glossary
CHAPTER I - Basics

Electronic Office Management

Electronic Office Management is the term used at the University of Texas at Austin to refer to the departmental authorizations needed to create electronic documents and route them through the approval process.

The Electronic Office Management (EOM) system is a Web-based application used by electronic office managers and delegates to maintain departmental authorizations and document routing.

Electronic Office Management home page: https://utdirect.utexas.edu/ew

The Electronic Office

An electronic office is a group of university employees who use a particular group of units and accounts to perform administrative functions for a particular department or other university entity. Electronic offices are maintained by electronic office managers and delegates.

The people who work in a particular electronic office are arranged into groups called desks. People assigned to these desks use units (and the accounts within them), which are grouped into views.

The Electronic Office Manager

The electronic office manager is the primary individual responsible for maintaining an electronic office. The electronic office manager can be the unit head of an organizational or funding unit or, more often, can be an administrator working on behalf of the unit head or department.

Electronic office managers are the only people authorized to update electronic signature authority for an electronic office (see Electronic Signature Authorization section).
The Delegate

A delegate is an assistant to the electronic office manager. An electronic office must have at least one and may have up to two delegates. Delegates have the same authority to make updates within an electronic office with the exception that they cannot update electronic signature authority (see Electronic Signature Authorization section).

Desks

A desk is a group of university employees working in the same electronic office. Often, this group shares 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 group of one or more units and accounts that belong to 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.

Any time a unit is moved into an electronic office, an authorization view is automatically created for that unit. Authorization views created in this way cannot be deleted.

Command Authorizations

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

Routing views are used to control how electronic documents route through the approval process (document routing) and contain one or more units and accounts that belong to an electronic office.

A unit or account can be assigned to only one routing view, but routing views can contain multiple units and accounts. Any time a unit is moved into an electronic office, a routing view is automatically created for that unit. Routing views created in this way cannot be deleted.

Office managers and delegates often create one primary routing view and move units and accounts into it in order to reduce the number of routing views that need to be maintained.

Document Routing

Document routing controls how electronic documents move through the approval process from creation to final approval. Routing setup is flexible and can be established for individual document types, groups of documents, groups of units or accounts, individual desks, and so on.

There are three levels of document routing: departmental, dean/vp, and processing office.

Electronic Signature Authorization

Electronic signature authorization is granted to individuals on the signer desk. The signer desk is the last desk in departmental routing. Approval from an individual on the signer desk is required for a document to receive final departmental approval.

A maximum of eight people can be assigned to a signer desk, and the electronic office manager or a unit head must always be on the default signer desk for all routing views. When a routing view is created, the office manager is automatically assigned to the default signer desk.

**Note:** Only electronic office managers can update electronic signature authorizations via the signer desk.
Moving a Unit into an Electronic Office

Before an electronic office can be used for administrative processing it must contain at least one unit (which must contain one or more accounts).

To move a unit into an electronic office, complete the Move a unit into an electronic office section of the Signature Desk Request Form (http://www.utexas.edu/business/accounting/sign/) and fax or email it to:

Signature Desk
Fax: 512-232-3360
oa.signaturedesk@austin.utexas.edu

Note: This form must be signed by the unit head or a unit head in the "reports to" hierarchy as shown on the GG6 screen in *DEFINE.

Creating an Authorization View

When a unit is moved into an electronic office, an authorization view is automatically created for it with the same name as the unit code. However, new authorization views are created to consolidate several units or accounts into one authorization view to make processing particular documents easier.

To create a new authorization view, complete the steps below:

1. From the EOM Navigation Menu, click Authorization Views.
2. Click Add Authorization View.
3. In the **Name** field, type the name of the new authorization view.
4. In the **Description** field, type the description of the new authorization view.
5. Click **Add**.
6. If the update was successful, a green success message appears and the new authorization view appears at the top of the table.

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### Moving a Unit or Account into an Authorization View

After an authorization view is created, units or accounts can be moved into it. To do this, complete the steps below:

1. From the EOM Navigation Menu, click **Authorization Views**.
2. Find the authorization view to be updated, and from the **Units/Accounts** column click **Units(X)/Accounts(X)** or **Add** in the Units/Accounts column.
3. A pop-up window displays any units or accounts already in the authorization view. Click **Add Unit/Account**.
4. For Type, select Unit or Account/Budget Group.
5. In the Unit/Acct/Budget Group field, type the unit, account, or budget group being added.
6. Click **Add**.
7. If the update was successful, a green success message appears and the new unit, account, or budget group appears at the top of the table.
8. Click the red X in the upper right-hand corner to close the pop-up window.

## Creating a Desk

When an electronic office is initially created, a default desk is automatically created and the electronic office manager and delegate(s) are assigned to it. Additional desks must be created manually by the electronic office manager or a delegate.

Desks can be created for a variety of different purposes. Typically, desks are created to serve a particular administrative purpose, such as creating travel documents or payment vouchers.

To create a new desk, complete the steps below:
1. From the EOM Navigation Menu, click **Desks**.
2. Click **Add Desk**.
3. In the **Name** field, type the name of the new desk.
4. In the **Description** field, type the name of the new desk.
5. Click **Add**.
6. If the update was successful, a green success message appears and the new desk appears at the top of the table.
Assigning People to a Desk

Before a user can create electronic documents or use a department’s accounts, the individual must be assigned to a desk in the department’s electronic office.

To assign someone to a desk, complete the step below:
1. From the EOM Navigation Menu, click **Desks**.
2. Click [**View/Edit Assignees(*)**] next to the desk.
3. A pop-up window displays the current desk assignees. Click **Add Desk Assignee**.
4. In the **EID** field, type the UT EID of the individual.
5. If the individual is going to be a substitute on the desk, mark the **Substitute** check box.
6. Click **Add**.
7. If the update was successful, a green success message appears and the individual added appears at the top of the table.
8. Click the red X in the upper right-hand corner to close the pop-up window.

Linking a Desk to an Authorization View

Before any of the individuals assigned to desks can use the accounts in authorization views, a desk must be linked to one or more authorization views.

To link a desk to an authorization view, complete the steps below:
1. From the EOM Navigation Menu, click **Authorization Views**.
2. Click **Desks Linked to View** or **Link Desk**.
3. A pop-up window displays all desks (if applicable) currently linked to the selected authorization view. Click **Add New Desk/View**.

4. In the **Desk to Link** field, type the name of the desk to link to the authorization view.

5. Click **Link**.

6. If the update was successful, a green success message appears and the new linked desk/view appears at the top of the table.

7. Click the red X in the upper right-hand corner to close the pop-up window.

### Command Authorizations

Now that a desk is linked to an authorization view, the linked desk/view must be authorized to view or update specific commands in *DEFINE or on the Web. This is done by granting command authorizations to the linked desk/view.

To begin the process of granting command authorizations to a linked desk/view, complete the steps below:

1. From the EOM Navigation Menu, click **Command Authorizations**.

2. In the row next to the desk/view to be updated, click **View/Edit Command Auths**.
3. A pop-up window displays command authorizations for each group of commands.
4. Click **Edit Command Authorizations**.
5. From the **Commands to Edit** drop-down menu, select the command to be added or updated. The displayed list changes to reflect the command selection.
6. Select the statuses to be applied to the commands. Selecting S, U, or V at the top levels (e.g., YMM or YPM) defaults all lower level commands to that authorization status and does not allow updates to lower level command statuses. Selecting None at the top level command allows updates to authorizations at the lower levels.
7. Click **Update**. If the update was successful, a green success message appears.
8. Click the red X in the upper right-hand corner to close the pop-up window.

Creating a Routing View

When a unit is moved into an electronic office, a routing view is automatically created for it with the same name as the unit code. Office managers and delegates may choose to create one primary routing view for all of their units and accounts to reduce the number of routing views that need to be maintained.

To create a new routing view, complete the steps below:
1. From the EOM Navigation Menu, click **Routing Views**.
2. Click **Add Routing View**.
3. In the **Name** field, type the name of the new routing view.
4. In the **Description** field, type the description of the new routing view.
5. Click **Add**.
6. If the update was successful, a green success message appears and the new routing view appears at the top of the table.

**Moving a Unit or Account into a Routing View**

After creating a routing view, units or accounts can be moved into it by completing the steps below:

1. From the EOM Navigation Menu, click **Routing Views**.
2. Find the routing view to be updated, and in the **Units/Accounts** column, click **Units(X)/Accounts(X) or Add**.

3. A pop-up window displays the units and/or accounts in the routing view. To add a new unit or account, click **Add Unit/Account**.
4. For **Type**, select **Unit** or **Account/Budget Group**.
5. In the **Unit/Acct/Budget Group** field, type the unit, account, or budget group to add.
6. Click **Add**.
7. If the update was successful, a green success message appears and the new unit, account, or budget group appears at the top of the table.
8. Click the red X in the upper right-hand corner to close the pop-up window.

### Creating a Routing Sequence

Routing sequences control how electronic documents route for approval. A routing view can have a single routing sequence for all forms (electronic documents) or separate routing sequences based on creator desks, forms, or both.

To create a new routing sequence, complete the steps below:

1. From the EOM Navigation Menu, click **Routing Sequences**.
2. Find the routing sequence to update and in the Departmental column, click **Departmental Routing (X)** or **Add**.

   ![Routing Table]

   3. A pop-up window displays any existing routing sequences (if applicable). To add a new routing sequence, click **Add/Edit Routing Sequence**.
4. In the **Form** field, type the form command, or an asterisk (*) to include all forms. **Note**: Use masking (.) to include all types of a form. For example, typing **VP**. in the **Form** field causes all forms that begin with VP to follow this routing sequence (if the creator desk is not specific). Typing **V..** in the **Form** field causes all forms that begin with V to follow the same routing sequence (if the creator desk is not specific).
5. In the **Creator** field, type a creator desk, or an asterisk (*) to include all creator desks.
6. In the **Sequence** fields, type the names of the desks that documents must route to for approval. Up to four desks are allowed.

7. Below each desk in the routing, select whether the desk should be:
   a. **Normal** - one person on the desk must approve
   b. **Notify** - persons on desk receive a notification about the document in their inboxes but do not need to approve the document
   c. **FYI** – persons on desk receive a notification about the document, but the document does not appear in their inboxes, nor do they need to take action on the document.

8. Click **Update**.

9. If the update was successful, a green success message appears and the new routing sequence appears at the top of the table.

10. Click the red X in the upper right-hand corner to close the pop-up window.

### Updating Electronic Signature Authorizations

To update electronic signature authorizations, complete the steps below:

1. From the EOM Navigation Menu, click **Signature Authorizations**.

2. Find the routing sequence to update and in the **Signature Authorizations** column, click **View/Edit Signer Auths**.

3. A pop-up window displays the existing signature authorizations for the selected routing view. Click **Edit Signature Authorizations**.

4. From the **Desk** drop-down menu, select the signer desk to update. **Note:** If updating any desk other than the default desk, uncheck **Use DEFAULT signature authorization**.

5. In one of the **Signer EIDs** fields, type the UT EID of the signer.

6. Click **Update**.
7. If the update was successful, a green success message appears and the new signature authorizations appear in the table.
8. Click the red X in the upper right-hand corner to close the pop-up window.

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 View**
A group of units and/or accounts that allows 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

**Dean/VP Routing**
A type of document routing available to official units; allows offices to require forms (documents) created by subunits to route to the office of the official unit to which the subunits report. Documents follow dean/vp routing after completing departmental routing. Dean/VP routing is optional for most documents, and the office which owns the unit creates and updates this type of routing.

**Delegate**
A delegate is an assistant to the electronic office manager. An office may have up to two delegates. Delegates have the same authority as office managers; however, they cannot update electronic signature authorizations. Delegates can be updated by the office manager or another delegate.
**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**
A group of people (assigned to desks) and units and accounts (grouped into views). An electronic office provides administrative support for the accounts in the units that unit heads have granted the office control over. An electronic office is maintained by the office manager and delegates.

**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 that runs 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.

**Processing Unit**
A unit that final approves a document after the document has received all departmental approvals. Each document type has a processing unit responsible for it and each processing unit maintains a processing office. Examples of processing units are Accounts Payable, Budget, Payroll, and Purchasing.

**Routing Sequence**
A routing sequence determines the routing path of electronic documents. Routing sequences are created by the electronic office manager and delegates.

**Routing View**
A routing view controls document routing. A unit or account can be assigned to only one routing view, but routing views can contain multiple units and accounts. When a unit is moved into an office, a routing view for the unit is automatically generated. However, office managers and delegates often create one primary master view that they move their units and accounts to in order to reduce the number of routing views that need to be maintained.

**Signature Authorization (electronic)**
Authorization granted to individuals on the signer desk. Signer desk approval is required for certain documents to reach final approval in departmental routing and continue on to dean/vp and processing routing.

**Signer Desk**
The last desk in departmental routing. Approval from an individual on the signer desk is required for a document to receive final departmental approval. The electronic office manager or a unit head with a unit in the office must always be on the default signer desk.
**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.