

VTA, VTB - New Commands for Transfer Documents Instructions for Electronic Office Managers

The electronic office manager will need to "turn on" the following new commands for you and your staff to be able to access this new document in FRMS in January.

Note: These new commands will not become available to campus until mid/late January, but you can complete these steps in your electronic office early to be ready for new transfer documents, **VTA**, and **VTB** (in FRMS) which are replacing the old VT1, VT2, and VT3 commands (in DEFINE).

In short, these steps are quick to update:

- Step 1: Review Electronic Office Authorizations,
- Step 2: Choose VMM, VTM Authorizations Groups
- Step 3: Update authorizations for VTM menu group
- Step 4: Complete these changes
- Step 5: Repeat these steps for each Desk/View combination

Before we get started, a short refresher about electronic office structure and concepts.

People Use Accounts to process accounting documents

Desks = Lists of People

Views = Lists of Accounts

Commands = Documents/Transactions (MMM, GTM, VP2, VT5, VTA, VE5, etc...)

Command Authorizations = Desk + View + Command = (to do) Document Processing

Tip! Use the **YS1** screen to view/switch among your current available Desk/View combinations anytime

Tip! Without needing to login to electronic office directly, you can learn a lot from YS1 and HDM commands!

Step 1: Review Electronic Office Authorizations

Desk	View	View Description
CLA-GRAD	CLASSIC	ALL ACCOUNTS IN CLASSICS
CLA-PAR	CLASSIC	ALL ACCOUNTS IN CLASSICS

Once logged into Electronic Office, choose your electronic office from listing to view office details.


(1) Choose **Command Authorizations** (left navigation) menu item.

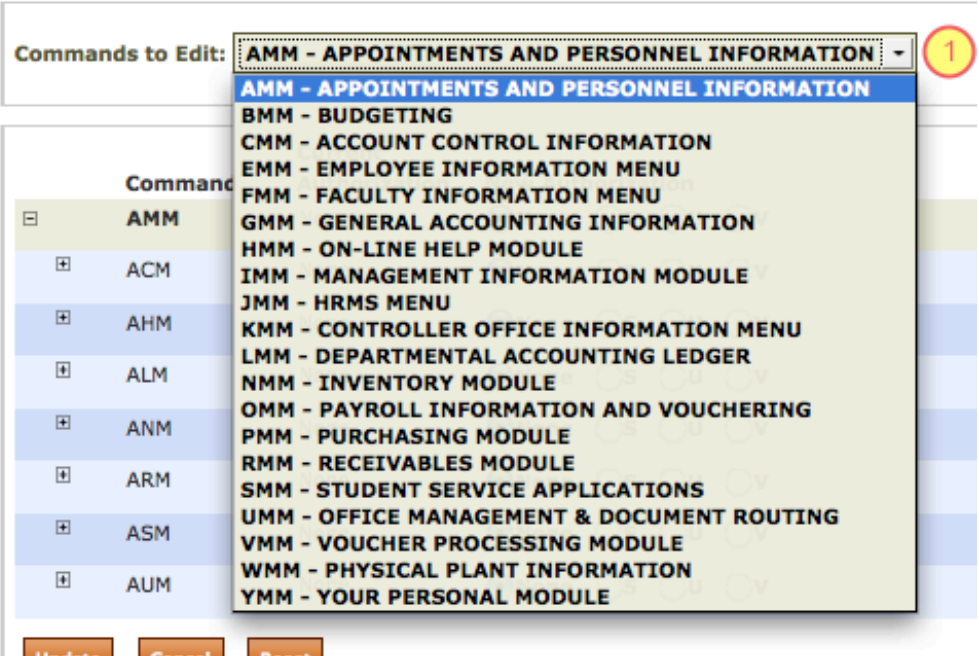
(2) Choose the **Desk/View** combination you use most often by selecting **[View/Edit Commands]** from the right side for this row in listing.


This displays a full listing of all commands by menu group (AMM, GMM, VMM, etc)

Step 2: Choose VMM Authorizations Group

Authorizations of **S**, **U**, and **V** are inherited: an authorization granted at the module level (xMM) will be given to all of the menus and commands that fall under that module. An authorization granted at the menu level (xxM) will be given to all the commands that fall under that menu. **Note:** To grant an authorization at a lower level, you must first select "None" as the higher level authorization before you can specify lower-level authorizations.

Note:  indicates that authorizations at a lower level are different. Please check to ensure you are submitting the correct authorizations.



Commands to Edit: **AMM - APPOINTMENTS AND PERSONNEL INFORMATION** 

Command	Module
AMM	AMM - APPOINTMENTS AND PERSONNEL INFORMATION
ACM	BMM - BUDGETING
AHM	CMM - ACCOUNT CONTROL INFORMATION
ALM	EMM - EMPLOYEE INFORMATION MENU
ANM	FMM - FACULTY INFORMATION MENU
ARM	GMM - GENERAL ACCOUNTING INFORMATION
ASM	HMM - ON-LINE HELP MODULE
AUM	IMM - MANAGEMENT INFORMATION MODULE
	JMM - HRMS MENU
	KMM - CONTROLLER OFFICE INFORMATION MENU
	LMM - DEPARTMENTAL ACCOUNTING LEDGER
	NMM - INVENTORY MODULE
	OMM - PAYROLL INFORMATION AND VOUCHERING
	PMM - PURCHASING MODULE
	RMM - RECEIVABLES MODULE
	SMM - STUDENT SERVICE APPLICATIONS
	UMM - OFFICE MANAGEMENT & DOCUMENT ROUTING
	VMM - VOUCHER PROCESSING MODULE
	WMM - PHYSICAL PLANT INFORMATION
	YMM - YOUR PERSONAL MODULE

Choose **VMM** from pulldown listing from **Commands to Edit**.
Do not choose the Update/Reset/Cancel button yet, and allow the pulldown update with your choice of VMM

Step 3: Update authorizations for VTM menu group

Commands to Edit: **VMM - VOUCHER PROCESSING MODULE**

	Command	Current Authorization	New Authorization			
[-]	VMM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
[+]	VCM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
[+]	VEM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
[+]	VJM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
[+]	VPM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
[+]	VTM	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VTA	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V 1
	VTB	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V 2
	VTC	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VTD	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VTP	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VTR	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VT1	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
	VT2	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
	VT3	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
	VT4	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
	VT5	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V 3
	VT6	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V 4

Choose the **VTM** commands by choosing the **[+]** plus sign to expand the listing further (VCM, VPM, VTM, etc) from VMM group
 Next, you'll selectively turn on/off the desired commands using: none, U (Update), V (view).

(1) Choose **U-Update** for **VTA**

(2) Choose **U-Update** for **VTB**

Usually VT1, VT2, VT3 are already set for update ability but you don't have to adjust those further since these commands will go away.

(3) Choose **V-View** for **VT5**

(4) Choose **U-Update** for **VT6**

Choose **None** for **VT7**

Note:

VTA will replace VT1, VT2, and VT3 in mid/late January

VTB will replace VT6 in mid/late January

Note:

View will allow users to view documents (their coversheets, and transactions).

Update will allow users to create/approve forward documents.

Super is same as update and has further benefit/effect in departmental offices beyond update.

Step 4: Complete these Changes

VT2	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
VT3	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
VT4	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
VT5	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V
VT6	U - Update	<input type="radio"/> None	<input type="radio"/> S	<input checked="" type="radio"/> U	<input type="radio"/> V
VT7	None	<input checked="" type="radio"/> None	<input type="radio"/> S	<input type="radio"/> U	<input type="radio"/> V

Now Choose **Update** button to complete these change (orange - button at bottom of popup)

Tip! If you would like to "reset" the current authorizations for an entire menu group, you can choose "none" at the VTM level, then choose the orange update button for that to take effect, then repeat steps 2-4 again to refine the authorizations you want for that cluster of commands.

Step 5: Repeat these steps for each Desk/View combination

Home		Office Details		Authorizations		Routing	
Authorization (Admin) Views				Desks		Command Authorizations	
[LINK A DESK AND AUTHORIZATION (ADMIN) VIEW]							
↕Desk	↕View	↕View Description		↕Command Authorizations			
EH:HMIN	EH:HMIN	OVERALL ADMIN VIEW	1	[VIEW/EDIT COMMAND AUTHS]			
HMIN DIREC	EH:HMIN	OVERALL ADMIN VIEW	2	[VIEW/EDIT COMMAND AUTHS]			
HMIN-2-APP	EH:HMIN	OVERALL ADMIN VIEW	3	[VIEW/EDIT COMMAND AUTHS]			

You and your staff are likely to have several desk/view combinations that you use routinely. You will need to "turn on" the **VTA** and **VTB** commands for each desk/view combination that you and your staff use when working with these documents. This will allow you to work with them in FRMS once the new documents become available to campus in January.

You'll be able to avoid nuisance messages like the following:

>>You are not authorized for VTA in your current desk and view<<

So, return to the "Command Authorizations" menu in left navigation, and choose the **[View/Edit Command Auths]** for each desk/view combination desired.

For example, in my office I have a creator desk (EH:HMIN), a desk for second approvers (HMIN-2-APP), and a desk for unit head (HMIN DIREC). So if each of these people need to view/approve these documents in FRMS, I'll need to "turn on" that command in each of my desk/view combinations.

Of course, I would not need to turn this command on for every desk/view combination in entire electronic office, just those that need it.

- **NEED HELP? HAVE QUESTIONS? WANT MORE INFO?**

The electronic office is often rarely used by most managers and is really just the way you configure things once to route documents. While we do have good online resources and training for this system (my good friend Gary Martt), please know that you can always

contact **John Ward at 232-2476**

for assistance with

- **making any changes to your electronic office**
- clean up unwanted desk/view combinations
- removing or altering desks/views/routing
- understanding how/why this system works
- consults on how to streamline things in general