

**DEPARTMENTAL  
FAMIS SECURITY  
CONTACT  
PERSON  
MANUAL**

**September 2007**

**Version 3.0**

**Texas A&M University**

**Division of Finance**

**Financial Management Operations**

© 2007 Texas A&M University. All Rights Reserved

This is unpublished information that contains trade secrets and other confidential information that is subject to a confidentiality agreement. The unauthorized possession, use, reproduction, distribution, display or disclosure of this material or the information contained herein is prohibited.

This page is intentionally left blank.

# Introduction

The purpose of this manual is to assist FAMIS departmental contact persons in managing their departmental FAMIS files.

To make suggestions for this manual or call attention to errors, please contact (979) 847-8833 or copy the page with the error, note the correction or suggestion and send it to:

Texas A&M University  
Financial Management Operations FAMIS Security  
750 Agronomy Road, Suite 3101  
6000 TAMU  
College Station, TX 77843-6000

This page is intentionally left blank.

# Table of Contents

<b>Introduction .....</b>	<b>3</b>
<b>Table of Contents .....</b>	<b>5</b>
<b>Resources .....</b>	<b>7</b>
<b>Texas A&amp;M University Customers .....</b>	<b>8</b>
<b>FAMIS Contact Person Responsibilities .....</b>	<b>9</b>
Assigning a Contact Person .....	11
<b>FAMIS Access .....</b>	<b>12</b>
Authorized FAMIS Users .....	12
Full-Time and Part-Time Employees .....	12
Student Workers .....	12
Temporary Workers .....	12
Employees from Other Texas A&M System Parts.....	12
Authorized Users by Department.....	13
Access Types .....	13
FAMIS Systems .....	13
Financial Record System - FRS .....	13
Financial Accounting Module .....	13
Accounts Payable Module .....	13
Accounts Receivable Module.....	13
Purchasing Module .....	13
Payroll Module .....	14
Budget Preparation Module .....	14
Fixed Asset System – FFX .....	14
Sponsored Research – SPR .....	14
Annual Financial Reporting – AFR .....	14
Specific Access by System .....	15
Table 1 – Access Types, Required Training and Forms Required .....	15
FAMIS Access Forms .....	18
Mentor Program.....	19
How the Mentor Program Works .....	19
Mentor Security – Access Sharing is Prohibited .....	19
Mentor Qualifications .....	20
Adding a New User.....	21
Step 1: Completing the FD-825 FAMIS Access Request.....	21
Step 2: Adding People to Routing Path.....	24
Changing Access.....	25
Step 1: Completing the FD-825 FAMIS Access Request.....	25
Step 2: Adding or Removing People to/from the Routing Path .....	27

Deleting Users .....	28
Why Deleting on Time is Crucial .....	28
Step 1: Completing the FD-825 FAMIS Access Request .....	29
Step 2: Removing People From the Routing Path.....	30
Budget Module Entry Access.....	31
<b>Terminations, Transfers, and Job Changes Within a Department .....</b>	<b>33</b>
Daily Payroll Reports .....	33
Terminations/Transfers.....	33
Keeping Access After a Job Change .....	34
No Access Changes Needed Due to a Job Change Within a Department .....	34
<b>Training.....</b>	<b>35</b>
Scheduling Procedures .....	35
Training Offered .....	35
<b>Electronic Office Management.....</b>	<b>36</b>
Office Manager/Delegate Screens.....	36
Finding the Office Manager/Delegate .....	37
Checking Routing Desks for an Individual .....	38
Completing the FD-940 Electronic Office Request .....	39
Sample FD-940 Electronic Office Request.....	41

---

# Resources

The following resources are available to all of our customers:

- FAMIS Security and Training
  - 979-458-1147 or 979-847-8833
  - E-mail - [famis-aid@tamu.edu](mailto:famis-aid@tamu.edu)
  - Texas A&M University FAMIS Website. Information on this site is targeted to Texas A&M University customers.  
<http://finance.tamu.edu/fmo/dydocs.asp#ts>
- Texas A&M University System FAMIS Website. Numerous FAMIS manuals exist at this site to help FAMIS users for every System agency.
  - <http://www.tamus.edu/offices/famis/>
- Financial Management Operations Electronic Listservs
  - See [http://finance.tamu.edu/fmo/docs/listserv\\_signup.asp](http://finance.tamu.edu/fmo/docs/listserv_signup.asp) for subscription information.

# Texas A&M University Customers

The Division of Finance's Financial Management Operations Department at Texas A&M University - College Station provides FAMIS security and training support for over 1,200 FAMIS users at the following Texas A&M University System parts:

- [Texas A&M University - College Station \(Part 02\)](#)
- Texas Veterinary Medicine Diagnostic Laboratory (Part 20)
- [Texas A&M University - Galveston \(Part 10\)](#)

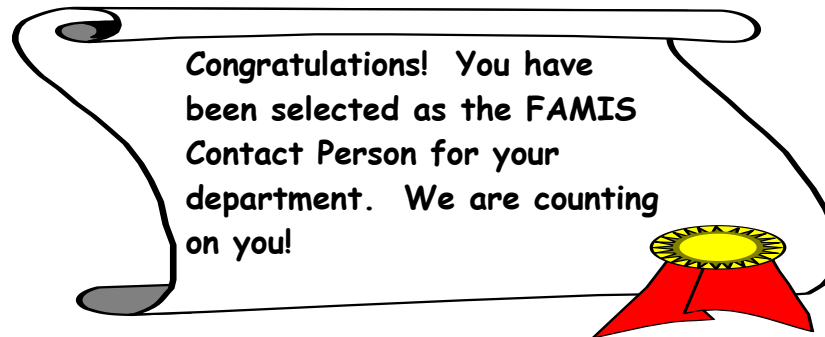
Financial Management Operations provides FAMIS training support only to the following System parts:

- [Texas Agricultural Experiment Station \(Part 06\)](#)
- [Texas Agricultural Extension Service \(Part 07\)](#)

Financial Management Operations may accept FAMIS training from other TAMU system parts with written documentation of the training completed and review of the training to assure that it does not substantially differ from the Training offered by Financial Management Operations

---

# FAMIS Contact Person Responsibilities



A **FAMIS Contact Person** is someone in the department who is responsible for maintaining the departmental FAMIS files. These files should contain documentation concerning access levels for everyone in the department who has FAMIS access.

The following is a list of Contact Person responsibilities:

1. **Complete FAMIS access forms.** The FAMIS Contact should complete FAMIS access forms to 1) maintain control over who receives certain access in the department and to 2) guarantee that all paperwork submitted to FAMIS Security is correct to avoid access delays.
2. **Analyze requests.** Contacts should analyze all FAMIS access requests. It is the department's responsibility to ensure that the FAMIS access given to the employees is correct *at all times* and is directly tied to the person's job duties *at all times*.
3. **Maintain files/records.** Contacts should keep a file for each individual requesting FAMIS access. Since individuals sometimes change jobs within the department, contacts should also periodically review the access to ensure that it is correct at all times. If no FAMIS access records exist in the department, a FAMIS Contact may request copies from FAMIS Security.
4. **Notify FAMIS Security and Office Manager/Delegates of terminations or job changes.** *No individual should have any FAMIS access after he/she has terminated or transferred to another department.* Contacts will need access to job change information within the department so they can notify FAMIS Security and the Department's Office Manager of any job changes requiring access changes.
5. **Report security breaches.** Contacts should report any security breaches and/or password sharing to FAMIS Security for further investigation and possible disciplinary action. See <http://finance.tamu.edu/fmo/ts/docs/breach.asp> for security breach procedures.
6. **Brief new employees about FAMIS.** Individuals who know why they are attending training get the most out of the training. Please do not send employees to FAMIS training without explaining what FAMIS is and how it will benefit their job.

7. **Schedule training.** Contacts should be aware of the scheduling procedures and ensure that FAMIS users get scheduled for all of the required courses needed to retain access. Student workers are required to attend the same required classes as staff. Please keep this in mind when hiring them to do purchasing module functions.
8. **Communicate information to users.** FAMIS Security utilizes an electronic mail listserv system to distribute important FAMIS information. Individuals with e-mail subscribe. See [http://finance.tamu.edu/fmo/docs/listserv\\_signup.asp](http://finance.tamu.edu/fmo/docs/listserv_signup.asp) for subscription instructions. Whenever FAMIS Security needs to relay information, they send one email to everyone who has subscribed to the listserv.
9. **Maintain records of additional systems where access is granted by FMO** users may also have FMO and/or Payroll Imaging Access, USAS, Payformance, CORE, or Pathway Net access (including a Purchasing Card or CBA). The Security contact is responsible for assuring that access to these systems is removed, or modified at any time a personnel action is submitted. These include Transfer, Promotion, Retirement or Termination.

**Note:** *FAMIS Security will automatically subscribe all FAMIS Contacts to the listserv. They will only subscribe individual users if they ask to be subscribed using the FD-825 FAMIS Access Request and provide a valid e-mail address; otherwise users subscribe themselves.*



---

## Assigning a Contact Person

To assign a FAMIS Contact Person, the department submits the *FMS-800 FAMIS Contact Person Responsibilities* form to FAMIS Security. The individual will become the primary contact for the department/sub-department unit(s) listed on them form.

In Figure 1, Ms. Ivana B. Contact is the contact person for FISC/no sub-department, FISC/OPS, and FISC/ACCT.

**Figure 1 – FMS-800 FAMIS Contact Person Responsibilities Sample**

<b>FMS-800 FAMIS CONTACT PERSON RESPONSIBILITIES</b>			
As the FAMIS contact person for my department, I understand that I am responsible for the following:			
<ol style="list-style-type: none"> <li>1. Completing security access forms.</li> <li>2. Analyzing security access requests for appropriateness and completeness of the request.</li> <li>3. Maintaining FAMIS files/records.</li> <li>4. Notifying FAMIS Security and Office Manager/Delegates of terminations or job changes that require security access changes.</li> <li>5. Reporting security breaches to FAMIS Security.</li> <li>6. Briefing new employees about FAMIS.</li> <li>7. Scheduling training.</li> <li>8. Communicating FAMIS information to users.</li> </ol>			
Please complete the following:			
<u>FISC, FISC/OPS, FISC/ACCT (or FISC/all sub-departments)</u>			<u>02</u>
List All Dept/Sub-department Codes in which you are the Contact			Campus Part #
<u>845-0000</u>	<u>6000</u>	<u>ivana@tamu.edu</u>	
Phone Number	Mail Stop	E-mail address	
<u>Ivana B. Contact</u>	X	<u></u>	<u>1-3-02</u>
Print Name		Signature of Contact Person	Date
<u>U.B. Contact</u>	X	<u></u>	<u>1-3-02</u>
Print Dept Head Name		Signature of Department Head	Date



# FAMIS Access

## ***Authorized FAMIS Users***

### **Full-Time and Part-Time Employees**

Any Texas A&M University employee may receive access to FAMIS as long as the access relates to the individual's job functions. Any individual who is not a Texas A&M University employee must have justification for needing access, in which case Financial Management Operations must approve. All employees who are on leave, of any kind, for more than 2 weeks must have their FAMIS access temporarily expired.



### **Student Workers**

Student workers may have FAMIS access. They are required to attend the same required classes as staff. Unless there are *significant* extenuating circumstances, we cannot schedule one-on-one training for student workers who are unable to meet the training requirements due to their class schedules. Please keep this in mind when hiring them to do purchasing module functions. Also, student workers' must have their access temporarily expired during holidays and breaks which exceed 2 weeks, including internships, summer holidays, etc.

**It is the FAMIS Contact's sole responsibility to notify FAMIS Security if a student worker terminates.** Student workers do not appear on security reports; therefore, FAMIS Security will not know when to remove FAMIS access. No one should keep access after he/she has terminated employment with the department.



### **Temporary Workers**

Temporary workers may have FAMIS access. They must attend all required training FAMIS classes at the regularly scheduled class time to keep access.

**It is the FAMIS Contact's sole responsibility to notify FAMIS Security if a temporary worker terminates.** Temporary workers do not appear on security reports; therefore, FAMIS Security will not know when to remove FAMIS access. No one should keep access after he/she has terminated employment with the department.



### **Employees from Other Texas A&M System Parts**

Individuals employed at another Texas A&M System Part, for example, Health Science Center, Texas Agricultural Experiment Station, etc., may have FAMIS access to Texas A&M University as long as the access relates to the individual's job functions. The security coordinator where the person works should establish the FAMIS

---

identification number and forward all paperwork to Texas A&M FAMIS Security. The person must provide justification for needing access, in which case Financial Management Operations must approve.

### ***Authorized Users by Department***

Monthly, FAMIS Security updates the FAMIS user list and places the list on the website <http://finance.tamu.edu/fmo/ts/docs/overview.asp>. The list only shows the department that gave authorization for the person to have FAMIS access. It does not list the type of access individuals have, nor does it show exactly which department/sub-departments are listed on the individual's security record. For example, Kim Jones may be listed on the user list for CLGE – the College of Geosciences Dean's Office. However, Kim may have FAMIS access to multiple departments within the college.

### ***Access Types***

#### **FAMIS Systems**

The following systems are available in FAMIS: Financial Record System (FRS), Fixed Assets (FFX), Sponsored Research (SPR), and Annual Financial Reporting (AFR). See the *Specific Access by System* section for the different types of access one can request to each system.

#### **Financial Record System - FRS**

The most commonly used system is the Financial Record System (FRS). Within FRS are the following modules:

##### **Financial Accounting Module**

Departmental staff may enter and view budgets, revenues, expenses, and journal entries. FAMIS makes it easy to inquire on account balances, monthly statements, interdepartmental transfers and all transactions that have been posted to a department's account number.

##### **Accounts Payable Module**

FAMIS includes payment inquiry screens that allow users to tell vendors the status of payments for items that the department has purchased.

##### **Accounts Receivable Module**

Use this module if the department either charges or pays entities that are not part of Texas A&M University. These screens offer inquiry for transactions relating to billing and payment for goods or services rendered. For example, the Copy Center uses the accounts receivable screens to view charges for printing and copying for other System parts (i.e. Texas Agricultural Experiment Station).

##### **Purchasing Module**

The purchasing module allows departments to electronically create purchasing documents and to electronically route them to the appropriate people for approval.

There are numerous purchasing inquiry screens to help track the status of purchases from the initial order and receipt, all the way to the payment.

### **Payroll Module**

The payroll inquiry screens show information relating to payroll expense distribution. If access is given to the payroll module, an individual may view all payroll at Texas A&M. Many departments limit payroll inquiry access.

### **Budget Preparation Module**

Departments utilize budget entry and inquiry screens to prepare the annual budget that Texas A&M submits to the Board of Regents.

### **Fixed Asset System – FFX**

The *Fixed Asset (FFX) System* meets all inventory needs. This system is especially handy for Departmental Accountable Property Officers and Departmental Property Contacts who need to research or maintain inventory information.

### **Sponsored Research – SPR**

The *Sponsored Research (SPR) System* meets grant and proposal needs. Only the Division of Finance staff receives access to SPR. Any other requests must be justified and approved by Financial Management Operations.

### **Annual Financial Reporting – AFR**

The *Annual Financial Reporting (AFR)* module meets state reporting needs. Only individuals in the Division of Finance receive access to AFR.

---

## Specific Access by System

Table 1 explains the different types of access departmental users may receive, training required to keep the access, and which form is required to request the access. Get a complete list of FAMIS screens at: <http://finance.tamu.edu/fmo/ts/docs/purchasing.asp>.

**Table 1 – Access Types, Required Training and Forms Required**

Access Type	Training Required	Form
<b>Financial Record System (FRS) Access</b>		
<p><b>Basic Inquiry</b> – Inquiry to all FRS screens <u>except</u> Screen 910-In-Box (unless the person has approving/signing or purchasing document entry access) and payroll screens. Basic inquiry includes screens related to financial accounting, accounts payable, accounts receivable, purchasing documents, and budget information. This automatically comes with all other FRS access that is requested.</p>	Introduction to FAMIS (required)	FD-825
<p><b>Payroll Inquiry</b> – Inquiry to M70 screens 770-779. These screens show payroll detail, and should be restricted to only individuals who need them to fulfill job duties. Individuals can view all payroll at Texas A&amp;M. This access cannot be restricted to the department's payroll.</p>	Introduction to FAMIS (required)	FD-825
<p><b>Support Account Entry/Maintenance</b> – Entry capability to M05 screens 50, 53, 54, and 56. These screens enable departmental personnel to create support accounts, change support account flags, and move budget and transactions between support accounts.</p>	Introduction to FAMIS (required) Support Account (optional)	FD-825

<p><b>Departmental Profile Entry/Maintenance</b> – Entry to M07 screens 715, 720, and 730. These screens allow creation of profiles so one can look at FAMIS accounts the way he/she needs to see them. Create many different profiles and use them to see transactions in different ways. For more information see the Departmental Accounting User’s Manual at this website: <a href="http://sago.tamu.edu/famis">http://sago.tamu.edu/famis</a></p>	<p>Introduction to FAMIS (required)</p>	<p>FD-825</p>
<p><b>Budget Module Entry</b> –Allowed only during the annual budget process. These screens allow departmental users to input budgets for specified accounts and to initiate budget transfers. After each budget cycle, access is removed. It must be requested each year.</p>	<p>Introduction to FAMIS (required) Budget Module (required)</p>	<p>FD-580 annually</p>
<p><b>Purchasing Office Manager/Delegate Entry/Maintenance</b> – This is access to add/remove people to/from the creator, approver, and signer desks for a department’s on-line routing. An <i>Office Manager</i> can change all desks. An <i>Office Manager Delegate</i> can do everything except change on-line signers.</p>	<p>Introduction to FAMIS (required) Office Manager (optional)</p>	<p>FD-940</p>
<p><b>Purchasing Document Approving/Signing</b> – Approving access gives authority to approve, in other words, review on-line purchase documents. Signers have signature authority for purchase documents. <b>FAMIS Security must give the screen access and the department’s Office Manager must add the person to the approver/signer desk to enable all access.</b></p>	<p>Introduction to FAMIS (required) Approving/Signing (required) Disbursement (required)</p>	<p>FD-825</p>
<p><b>Exempt Purchase Document Entry</b> – Entry access to purchases that are above the delegated dollar limits but are exempt from Purchasing Services review (See Screen 306 i.e., utilities, memberships, etc). <b>FAMIS Security must give the screen access and the department’s Office Manager must add the person to the creator desk to enable all access.</b></p>	<p>Introduction to FAMIS (required) Limited/Exempt Entry (required) Requisitions (required) Disbursement (required)</p>	<p>FD-825</p>
<p><b>Limited Purchase Document Entry</b> – Entry access to purchases that are less than \$5,000 on state or local funds. These purchases do not route to Purchasing Services. <b>FAMIS Security must give the screen access and the department’s Office Manager must add the person to the creator desk to enable all access.</b></p>	<p>Introduction to FAMIS (required) Limited/Exempt Entry (required) Requisitions (required) Disbursement (required)</p>	<p>FD-825</p>

	<b>Requisition Entry</b> – Entry access to purchases that are greater than \$5,000 on state or local funds. These purchases must route through Purchasing Services for a purchase order. <b>FAMIS Security must give the screen access and the department’s Office Manager must add the person to the creator desk to enable all access.</b>	Introduction to FAMIS (required) Limited/Exempt Entry (required) Requisition Entry (required) Disbursement (required)	FD-825
	<b>Receiving Entry</b> – Entry access to verify if goods were/were not received. Electronic receiving is the final authorization to pay for the goods.	Introduction to FAMIS (required) Receiving Entry (required)	FD-825
	<b>Preliminary Fixed Asset Entry</b> – Entry access to input inventory information for purchases that must be placed on inventory.	Introduction to FAMIS (required) Preliminary Fixed Assets (required)	FD-825
	<b>Disbursement Training</b> - This course <i>is not a FAMIS class</i> , but it covers policies and procedures for processing payments. Anyone who creates purchase documents, approves and/or signs them must attend disbursement training or all entry will be denied.		
	<b>Departmental Budget Request</b> – This is a hands on class for DBR creators.	Introduction to FAMIS (Required) DBR Creator Training (Required)	FD-825
	<b>Office Manager</b> – This access allows the individual to manage the electronic office, routing, paths and desks for specific departments	None	FD-940
	<b>FAMIS Departmental Security Contact</b> – this individual is responsible for completing the request for and tracking all FAMIS users in their Department.	None	FD-800
<b>Fixed Asset Module (FFX) Access</b>			
	<b>Approved and Disposed Fixed Asset Inquiry</b> – Access to view inventory for the department/sub-department requested.	Introduction to FAMIS (required) Fixed Asset Module (optional)	FD-825
	<b>Approved and Disposed Fixed Asset Maintenance (Update to FFX Screen 535)</b> –Access to change inventory locations, availability, purpose, and conditions of assets for a specified department/sub-department.	Introduction to FAMIS (required) Fixed Asset Module (optional)	FD-825

## **FAMIS Access Forms**

Find all FAMIS access forms at <http://finance.tamu.edu/fmo/dyforms.asp#ts>.

Three FAMIS access forms exist for requesting different types of access:

1. *FD-825 FAMIS Access Request*  
Use this form to add, change or delete access for all access *except* budget and office manager/delegate access.
  2. *FD-940 Electronic Office Request*  
*Note: If an Office Manager, Delegate or Default Signer terminates, submit the FD-825 to expire the access and the FD-940 to assign a new Office Manager or Delegate.*
    - a. Use to add/remove Departmental Office Managers. **Office Managers** are individuals who maintain the department's creator, approver and signer desks for on-line routing of purchasing documents.
    - b. Use to add/remove Departmental Office Manager Delegates. **Office Manager Delegates** maintain creator and approver desks for on-line routing of purchasing documents, but cannot change departmental signers.
    - c. Use to add/remove a Default Signer for signature authority to a department's on-line purchasing documents. A **Default Signer** is someone who can sign purchasing documents for all accounts in the department. FAMIS Security adds this person to Screen 940. Only one default signer can be assigned for an electronic office. The department's Office Manager can add up to five additional signers using Screen 923.
    - d. Use to add, change, or delete department/sub-department units from an electronic office.
  3. *FD-580 Budget Access Request*  
Submit this form annually for all individuals who will enter budget information into FAMIS during the annual budget process.
-

## Mentor Program



"I need all of my access now! I can't wait a month to do my job!"

**Assign mentors so that employees can receive access without going to training first!**

FAMIS Security designed the mentor program to meet the needs of those who need entry access to on-line purchasing documents immediately to perform job functions.

### How the Mentor Program Works

- Assigning a mentor is optional. Assign mentors using the *FD-825 FAMIS Access Request*. Assign more than one mentor if this helps the department. By assigning a mentor, the user will receive access to enter, approve, sign, receive or enter preliminary asset data for purchasing documents after completing *Introduction to FAMIS*. This will allow the mentor to coach the individual on how to use the FAMIS screens before he/she has a chance to attend other required training.
- FAMIS Security will set a **training deadline**. If the individual fails to attend the appropriate required training by the deadline, then the appropriate access will be denied.
- If a mentor is not assigned, then no entry access will be granted until the requestor attends all of the required training.

**If the user does not attend training by the assigned deadline, then entry access will be denied until he/she attends.**

### Mentor Security – Access Sharing is Prohibited

**Under no circumstance should a trainee ever use the mentor's access to inquire on data or input data into FAMIS. Trainees should always use their own access. If the access is not set up as needed, then contact FAMIS Security at 979-458-1147 or 979-847-8833.**

Once the trainee completes *Introduction to FAMIS*, he/she will receive all requested access on his/her FAMIS Identification Number to enter purchasing documents with the mentor's guidance. Only the person who is logged on to FAMIS should do any entry or inquiry. If not, then this constitutes a security breach, and FAMIS Security will be required to follow security breach procedures. For example, if John, the trainee, needs to input a limited purchase document, then he needs to log on to FAMIS using his

identification number and password to do it. Kim, the mentor, can sit by John and coach him through the screens, but Kim should not touch the keyboard if John is logged on. Likewise, Kim may never log on and allow John to input documents using her identification number and password, even if she is sitting beside him.

### **Mentor Qualifications**

The mentor must be an experienced purchasing module user. Mentors will assist the trainees with purchasing document entering, receiving, approving, signing, and entering preliminary fixed asset data until the trainee is able to attend all of the required training. If the mentor is unable to assist the individual with basic entry questions, then either assign another mentor, or FAMIS Security will deny the individual access to purchasing module screens until all training is attended.

---

## Adding a New User

This section explains all of the steps necessary to ensure that a new user receives all of the access needed to perform job functions.



Follow the steps below to *Add a New User*:

1. The FAMIS Contact should complete the *FD-825 FAMIS Access Request* and send it to Financial Management Operations - FAMIS Security at Mail Stop 6000. FAMIS Security will establish the access and contact the individual concerning access and training instructions.
2. Contact the department's Office Manager/Delegate to add the person to the creator, approver, or signer desk, if the person will perform those functions. See the *Electronic Office Management* section for more information.



**Caution: Step 2 is many times forgotten. Many people do not get placed on the Creator Desk (Screen 924), but will still be able to create documents if FAMIS Security gives them screen access. As a result, they will not receive all of their PIPs – Purchasing Invoice Problems – for purchasing documents that they create. This will cause delays in payments to vendors. See the *Electronic Office Management* section for more information.**

### Step 1: Completing the FD-825 FAMIS Access Request

Following are instructions for the *FD-825* for adding a user and a sample of a completed *FD-825 FAMIS Access Request*.

In this example, Ms. Gimmee Access will be responsible for assisting with the financial operations in the department. After analyzing the job duties, the following access is needed:

- FRS Basic Inquiry (FD-825)
- Payroll Inquiry (FD-825)
- Support Account Entry/Maintenance (FD-825)
- Departmental Profile Entry/Maintenance (FD-825)
- Exempt, Limited, and Requisition Document Entry (FD-825)
- Receiving Entry (FD-825)
- Preliminary Asset Entry (FD-825)

### **Part I: User Information**

In this section, include all information as submitted to Payroll Services. FAMIS Security will add the individual to the e-mail listerv if a valid e-mail address is given and the “Add to FAMIS e-mail listerv” is checked “Yes.”

### **Part II: Delete Information**

Skip if adding a new user.

### **Part III: Optional Additional Comments**

### **Part IV: Mentor Information**

See the *Mentor Program* section for more information. Complete this section if assigning a mentor. Without a mentor, no entry access is allowed until the person has attended the appropriate training. The user will only be allowed to inquire on the various FAMIS screens.

### **Part V: Access Information**

**Many people do not complete this section correctly. Please read the tips below.**

- This section replaces all current access. This section must be filled out completely every time an *FD-825* is submitted to FAMIS Security to avoid losing any access.
- If “Yes” is marked, then the department/sub-department unit must be specified. The unit tells FAMIS Security which accounts to give access. The following example is for requesting access to the Math Department:
  - Math/all – gives all Math accounts shown on Screen 68 in FAMIS.
  - Math or Math/none – gives only the accounts on Screen 68 that do not have a sub-department.
  - Math/Ops – Gives only the accounts on Screen 68 that have the department Math and the sub-department Ops.
- If “Yes” is marked, then specify which campus part where the individual needs access. For example, part 02 is the Texas A&M University campus, part 06 is the Texas Agricultural Experiment Station, etc.

### **Part VI: Required Signatures**

1. For new users and access changes, the user must always sign.
2. The department head or designee with signature authority must always sign.
3. If the department is academic, the senior business administrator must always sign. Senior business administrators work in the Dean’s office.
4. Signature authority means that they have completed an FMS-860 form and a paper copy is on file at FMO.

### **FD-825 User Profile**

New users should complete this section themselves. It helps them to understand why they are receiving FAMIS access. It also includes training information.

---

TEXAS A&M UNIVERSITY  
FD-825 FAMIS ACCESS REQUEST for Campus Part 02, 10 & 20

**IMPORTANT:** This form replaces *all* current access. Notify the Departmental FAMIS Contact of any FAMIS access changes. Call 979-847-8833 or e-mail [famis-aid@tamu.edu](mailto:famis-aid@tamu.edu) if you do not know your contact person.

State law requires that you be informed of the following: (1) you are entitled to request to be informed about the information about yourself collected by use of this form (with a few exceptions as provided by law); (2) you are entitled to receive and review that information; and (3) you are entitled to have the information corrected at no charge to you.

Part I: User Information – As submitted to Payroll Services.  Name ( First, Middle, Last): _____ FAMIS ID, if known: _____  Universal Identification Number (UIN): _____ Title: _____  Employing Department/Subdepartment: _____ / _____ Office Phone Number: _____ Mail Stop: _____  E-mail address: _____ Add to FAMIS e-mail listserv? Yes <input type="checkbox"/> No <input type="checkbox"/>					
Part II: Delete Information (skip if not deleting)  Delete all access: Yes <input type="checkbox"/> No <input type="checkbox"/> Delete partial access: Yes <input type="checkbox"/> No <input type="checkbox"/> (Complete Part V)  Effective delete date: _____			Part III: Optional additional comments:		
Part IV: Mentor Information – Required for gaining entry access to Purchasing Module screens before formal training. As the mentor, I will provide purchasing module training and assistance for the user. I have reviewed mentor policies and security issues at: <a href="http://finance.tamu.edu/fmo/ts/docs/mentor.asp">http://finance.tamu.edu/fmo/ts/docs/mentor.asp</a> .  Mentor e-mail: _____ Mentor phone: _____  Mentor Name _____ Signature X _____ Date _____					
Office Use Only:	Entered	Online Email	Online done	Training Email	Disbursement
Rec'd					

**Error!**

**Not a valid link.**

## Step 2: Adding People to Routing Path



1. The FAMIS contact must notify the department's Office Manager/Delegate to add the person to the routing path.
2. FAMIS Security is not authorized to do this step for the department.
3. If this step is not done, then there will be a delay in paying electronic bills because the individual will not have access to perform all job duties.

Check Screen 915 to see if the Office Manager/Delegate has added the person to the appropriate desks. See the *Electronic Office Management* section for more information.

Since Ms. Access will create limited, exempt, and requisitions documents, Screen 915 should look like this for her:

```
F0007 End of valid data reached
915 Approval Profile by Name

Screen: █ Name: _____
                                ACCESS, GIMMEE
Campus Cd   Office      Desk      Status      View
-----
      AM     FINANCE    CREATE DSK      FINANCE
```

## Changing Access

This section explains all of the steps necessary to add or remove access.



Follow the steps below to *Change Access*:

1. The FAMIS Contact should complete the *FD-825 FAMIS Access Request* and send it to Financial Management Operations - FAMIS Security at Mail Stop 6000. Submitting an FD-825 replaces all current access; therefore, be sure to include all access that the person should have or access will be removed. If additional training is required, FAMIS Security will contact the individual.
2. Contact the department's Office Manager/Delegate to add/remove the person to/from the creator, approver, or signer desk. Verify completion of this step by checking FAMIS Screen 915. See the *Electronic Office Management* section for more information.



**Submitting an FD-825 replaces all current access; therefore, be sure to include all access that the person should have or access will be removed.**

### Step 1: Completing the FD-825 FAMIS Access Request

Following are instructions for changing access and a sample of a completed *FD-825 FAMIS Access Request*. In this example, Ms. Gimmee Access has been promoted. She will now be responsible for signing on-line documents and performing office manager delegate duties. After analyzing the job duties, the following access is needed:

- FRS Basic Inquiry (FD-825)
- Approving/Signing (FD-825)
- Office Manager Delegate (FD-940) – See the *Electronic Office Management* section for more information about the *FD-940*.

### Part I: User Information

In this section, include all information as submitted to Payroll Services. FAMIS Security will add the individual to the e-mail listerv. A valid TAMU or Neo e-mail address must be given.

### Part II: Delete Information

If the person is terminating or if partial access is being removed, complete this section. Ms. Access's access needs to change on March 16, 2008.

### Part III: Optional Additional Comments

Typically the comments made here include instructions to use an existing user as a model for access or, that this access is in addition to existing access and current access should not be changed.

### Part IV: Mentor Information

See the *Mentor Program* section for more information. Complete this section if assigning a mentor. Without a mentor, no entry access is allowed until the person has attended the appropriate training.

### Part V: Access Information



- **This section replaces all current access.** This section must be filled out completely every time an *FD-825* is submitted to FAMIS Security to avoid losing any access.
- If “Yes” or “Delete” is marked, then the department/sub-department unit must be specified. The unit tells FAMIS Security which accounts to give access or which accounts to take away access. The following example is for requesting access to the Math Department:
  - Math/all –all Math accounts shown on Screen 68 in FAMIS.
  - Math or Math/none – gives only the accounts on Screen 68 that do not have a sub-department.
  - Math/Ops –only the accounts on Screen 68 that have the department Math and the sub-department Ops.
- If “Yes” is marked, then specify which campus part where the individual needs access. For example, part 02 is the Texas A&M University campus, part 06 is the Texas Agricultural Experiment Station, etc.

### Part VI: Required Signatures

1. For new users and access changes, the user must always sign.
2. The department head or designee with signature authority must always sign.
3. If the department is academic, the senior business administrator must always sign. Senior business administrators work in the Dean's office.

### FAMIS User Profile

Not necessary for access changes unless this information has changed.

---



## Step 2: Adding or Removing People to/from the Routing Path

1. The FAMIS contact must notify the department's Office Manager/Delegate to add or remove the person to/from the routing path.
2. FAMIS Security is not authorized to do this step for the department.
3. If this step is not done, then there is a risk of someone having too much or not enough access to pay bills.

Check Screen 915 to see if the person is currently on any desks. See the *Electronic Office Management* section for more information.

Since Ms. Access changed positions, she should no longer have access to the creator desk. Instead she should be a substitute approver, a primary signer, and an office manager delegate for the office of Finance. Screen 915 should now look something like this:

```
F0007 End of valid data reached
915 Approval Profile by Name

Screen: █ Name: _____
ACCESS, GIMMEE
Campus Cd Office Desk Status View
-----
AM FINANCE FINANCE
AM FINANCE SIGNER DSK FINANCE
AM FINANCE APPROVER S
```

## Deleting Users



**No one should ever keep access after the last day of employment in the department.**

This section explains all of the steps necessary to delete all access.



Follow the steps below to *Delete Access*:

1. The FAMIS Contact should complete the *FD-825 FAMIS Access Request* and send it to Financial Management Operations - FAMIS Security at Mail Stop 6000. **If someone leaves without warning, e-mail FAMIS Security at [famis-aid@tamu.edu](mailto:famis-aid@tamu.edu) and follow up with the *FD-825*.**
2. Contact the department's Office Manager/Delegate to remove the person from the creator, approver, or signer desk. Verify completion of this step by checking FAMIS Screen 915. See the *Electronic Office Management* section for more information.

### When to expire or delete access

1. When an employee terminates their employment with your department(s), voluntarily or involuntarily for any reason, including retirement.
2. When an employee is on medical (FMLA), vacation, or administrative leave, paid or unpaid, regardless of the reason for the leave.
3. When an employee is on sabbatical for more than 2 weeks
4. When an employee is no longer performing the job duties for which access was requested.

### Why Deleting on Time is Crucial

1. **Audit.** When a security audit is due, auditors will probably check to make sure that people get deleted no later than their last day of employment with the department. Departments may be required to explain procedures to the auditors. The FAMIS Contact must notify FAMIS Security in enough time for them to expire FAMIS access in a timely fashion. Work very closely with FAMIS Security so that everyone is in compliance.
  2. **Knowledge.** Unless a FAMIS Contact tells FAMIS Security of a termination, they may have no way of knowing that someone has terminated or changed positions until after the fact, which is too late.
  3. **Money.** It costs Financial Management Operations money to maintain the person's file and FAMIS user identification number.
  4. **Unauthorized access.** Pretend for a moment to be the FAMIS Contact Person for the Chemistry Department. The department head, John, has FAMIS access to sign purchasing documents on-line for the Chemistry Department. John takes another job to be the department head for the Management Department.
-

- a. FAMIS Security has been notified to expire his FAMIS access at Chemistry, but one step was forgotten - no one told the Office Manager to take John off of the Chemistry signer desk.
- b. John now works in the Management Department and needs FAMIS access to sign purchasing documents. The Management Department sends the *FD-825 FAMIS Access Request* to FAMIS Security. FAMIS Security reactivates John's old FAMIS user identification number. The Management Office Manager adds John to the Management signer desk. Guess what happens next?
- c. Since John is still on the Chemistry signer desk, and his FAMIS access has been reinstated, he can now sign purchasing documents for both Chemistry and Management.

Hopefully, you can see how crucial it is to follow all steps in deleting someone's FAMIS access.

### **Step 1: Completing the FD-825 FAMIS Access Request**

Following are instructions for deleting a user and a sample of a completed *FD-825 FAMIS Access Request* to delete Ms. Gimmee Access's access. Since Ms. Access was the Office Manager Delegate in a previous example, be sure to submit a new *FD-940 Electronic Office Request* replacing her with someone else as soon as possible. FAMIS requires a replacement. Until a new Office Manager/Delegate is assigned, FAMIS Security will place one of the security administrator names on Screen 940. See the *Electronic Office Management* section for more information.

#### **Part I: User Information**

In this section, include all information as submitted to Payroll Services.

#### **Part II: Delete Information**

Since the person is terminating, complete this section. Ms. Access's access needs to be deleted on May 1, 2002. Thus, the FAMIS contact must notify FAMIS Security before May 1, 2002.

#### **Part III: Optional Additional Comments**

#### **Part IV: Mentor Information**

Not required for deletes.

#### **Part V: Access Information**

Check "Delete" for everything.

#### **Part VI: Required Signatures**

1. The user's signature is not required for deletes.
2. The department head or designee with signature authority must always sign.
3. If the department is academic, the senior business administrator must always sign. Senior business administrators work in the Dean's office.

#### **FAMIS User Profile**

Not necessary for deletes.



1. The FAMIS contact must notify the department's Office Manager/Delegate to remove the person to/from the routing path.
2. FAMIS Security is not authorized to do this step for the department.
3. If this step is not done, then there is a risk of someone having signature authority on documents after they have transferred elsewhere and received FAMIS access.

Check Screen 915 to see if the person is currently on any desks. See the *Electronic Office Management* section for more information.

Since Ms. Access no longer works for the Finance Department, screen 915 should look like this:

```
F0245 No records found matching selection criteria
915 Approval Profile by Name

Screen: ____ Name: _____
                                ACCESS, GIMMEE
Campus Cd   Office   Desk   Status   View
-----

```

## ***Budget Module Entry Access***

**Budget access must be requested annually.**

Each year, every department submits a budget for the next fiscal year to the Dean/Director's office, and ultimately to the Vice-President for Finance Office. Colleges and non-academic entities have the ability to enter budgets for their accounts into FAMIS. This access should be very limited.

After each budget cycle, FAMIS Security must take away everyone's access to the budget entry screens. This keeps departmental employees from making changes to budgets while authorities review them. Thus, every year, budget access must be re-requested. Individuals request budget access by using the *FD-580 Budget Access Request*.

A sample is below.

Find more budget information at <http://finance.tamu.edu/budget> .

**FD-580 Budget Access Request**

**PART I: USER FACTS**

Indicate your FAMIS I.D. here \_\_\_\_\_

Full Name: \_\_\_\_\_ SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Position or Title: \_\_\_\_\_

Academic College or Division: \_\_\_\_\_

Department: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Mail Stop: \_\_\_\_\_ E-mail: \_\_\_\_\_

**PART II: BUDGET DUTIES**

<b>Check yes or no to identify which duties you will perform.</b>	<b>Yes</b>	<b>No</b>
<b>Budget Entry</b> - Use these screens to create/modify budgets in FAMIS, and to submit the correct budgets to FMS.		
Screen 589 – Subsidiary Ledger (SL) Account Budget Entry		
Screen 599 – Support Account (SA) Budget Entry		
<b>Transfer Funds Between Accounts (GL-General Ledger Account)</b>		
Screen 560 – GL to GL Transfers		
Screen 561 – GL to SL Transfers / Allocations		
Screen 562 – SL to SL Transfers / Allocations		
Screen 563 – SL to GL Transfers / Allocations		

**PART III: ACCOUNT ACCESS**

Indicate the level of access for which you require:

<b>Type of Access</b>	You must insert all of the the code(s) for which you need access
Example: Department/Sub-department access	FISC/OPS, FISC/NONE
Department/Sub-department access only (e.g. FISC/NONE)	
Entire college or division (e.g. Science)	
Entire executive level (e.g. Student Services)	

**PART IV: SIGNATURES**

USER:

\_\_\_\_\_ X \_\_\_\_\_  
 Printed Name User Signature Date

DEAN (if academic), DIRECTOR (if non-academic) :

\_\_\_\_\_ X \_\_\_\_\_  
 Printed Name Dean/Director Signature Date

---

# Terminations, Transfers, Job Changes Within a Department and Temporary Expirations

## Daily Payroll Reports



**Temporary workers and student workers do not appear on these reports.**

FAMIS Security receives a daily report of individuals with FAMIS access that appear to have job changes. Unfortunately, temporary workers and student workers do not appear on these reports. In addition, the report only shows a change and does not give details about what happened. Also, most individuals appear on the report after a change has occurred. FAMIS Security will follow up on these reports. If they do not receive a response from the FAMIS Contact, then they will expire the person's access until contacted by the FAMIS Contact.

## Terminations/Transfers

**FAMIS Security and Departmental Office Managers must remove the terminating/transfer employee NO LATER than the last day of employment. FAMIS Contacts must give everyone enough notice so that they can process the request either *before* or on the date of the effective employment change date.**

- *Notify FAMIS Security and the department's Office Manager as soon as the termination/transfer date is known.*
  - The FAMIS Contact may notify FAMIS Security by calling 979-847-8833 or e-mailing [famis-aid@tamu.edu](mailto:famis-aid@tamu.edu) with the information.
  - Follow up by sending in the *FD-825 FAMIS Access Request*.
  - FAMIS Contacts must give everyone enough notice so that they can process the request either *before* or on the date of the effective employment change date.
  - See the *Electronic Office Management* section for more information.
- FAMIS Contacts need to be notified of all job changes in the department. Any job change may require access changes (promotions, demotions, transfers, terminations).
- If the FAMIS Contact continually fails to notify FAMIS Security about job changes requiring access changes, then they will report it to either the senior business administrator or Director.
- If a person transfers to another department, the outgoing department should notify FAMIS Security of the transfer date ahead of time. The new department must submit an *FD-825 FAMIS Access Request* granting access through their department before the person's access will be reinstated.

## ***Keeping Access After a Job Change***

No one is authorized to keep access after a termination date or a job change where access must change. In cases where an employee promotes to a new position in the same department and needs to train the replacement, submit a written request to FAMIS Security. It is the FAMIS Contact's responsibility to let FAMIS security know when to take the access away.

## ***No Access Changes Needed Due to a Job Change Within a Department***

The FAMIS Contact should submit a written notification that no access changes are required. If security does not receive any notification, then they will remove the access until further notice. They do not have any way of knowing what type of job change a person receives if the FAMIS Contact does not notify them.

## ***Temporary Expirations***

Any time a user is on any type of leave for longer than 2 weeks; their FAMIS access must be temporarily expired. Types of leave include:

- FMLA or medical leave, paid or unpaid
- Vacation
- Sabbatical
- Internships
- Semester breaks or holidays greater than 2 weeks
- Administrative leave, paid or unpaid
- Suspension
- Jury duty for more than 2 weeks (unless they will be able to continue to work from an alternate location or the jury is not sequestered)

This is especially important with Student Workers. When they leave for a month at Christmas or over the summer break or for an internship, you must expire their access. You may assume they will return to work but, all too often they don't.

Reinstating the user's access when/if they do return is just as simple. The Security Contact sends an e-mail to [FAMIS-Aid@tamu.edu](mailto:FAMIS-Aid@tamu.edu) and the access is reinstated immediately. Depending on the length of access they may need to have their password reset. New FD-825 forms are not necessary unless their access has changed during their absence.

---



# Training

## **Scheduling Procedures**

Once FAMIS Security receives the appropriate paperwork, they will analyze the request for security/training needs and contact the individual needing access. They will give all scheduling information to the individual. If a mentor is named on the FD-825 the mentor will receive an electronic carbon copy of our correspondence.

## **Training Offered**

A variety of training courses are available. Some courses are optional. Some courses are mandatory to keep certain access.

Check [Event Registration](#) for all current training.



## Electronic Office Management

Texas A&M uses the purchasing module of FAMIS to process payments of purchases. **Purchasing Document Creators** in the department create electronic documents in FAMIS and route them electronically through a **departmental routing path** for a signature. The routing path consists of different “desks” for which the documents route. These desks are the **Creator Desk, Approver Desk** and **Signer Desk**.

The **Creator Desk** controls access to **Purchasing Invoice Problems (PIPs)** and serve as substitute creators for one another when a creator is away from the office. **FYA – For Your Approval - PIPs** are electronic documents that Financial Management Operations Accounts Payable auditors send to everyone on the Creator Desk if they find problems needing further approval on a document in the audit stage of the process. **Approvers** are people who review purchase document information before sending it to the signer for final approval. **Signers** are the people who have ultimate signature authority for signing purchasing documents.

**The department is responsible for keeping the people on the desks current.**

The department assigns **Office Managers/Delegates** to keep the desks current by using the *FD-940 Electronic Office Request*. **Office Managers** can modify everything in the routing path (creators, approvers, and signers). **Office Manager Delegates** can do everything except modify the signer desk.

### **Office Manager/Delegate Screens**

- Office Manager/Delegates use Screen 924, Creator Desk Modify, to add/remove purchasing document creators from the routing path.
  - Office Manager/Delegates use Screen 922, Approver Desk Create/Modify, to add/remove approvers from the routing path.
  - Only the Office Manager uses Screen 923, Signer Desk Modify, to add/remove signers from the routing path.
-



## Finding the Office Manager/Delegate

To find out who the Office Manager/Delegate(s) are for the department, follow these steps:

1. Proceed to Screen 941.
2. Type in the department/sub-department code, for example, department FISC and a blank sub-department for Financial Management Operations, and press Enter.
3. Locate the "Office" on the screen. See Figure 2. The office for this example is FMS.
4. Next, proceed to Screen 940, as in Figure 3. Type in the office found on Screen 941 and press Enter. The names of the Office Manager and Delegate(s) will appear. In Figure 3, they are Minnie Mouse and Danger D. Duck, Jr.

**Figure 2: Office Name on Screen 941**

```
F8236 Unit FISC is already in View VIEW01
941 Unit to Office Assignment

Screen: █ Dept: FISC_ SubDept: ____

Name: FINANCIAL MANAGEMENT SERVICES
Dept head: MAYNARD, MARILYN W

Office: FMS_____ Manager:
View : VIEW01

Exec Office:
```

**Figure 3: Office Manager/Delegate**

```
F0013 Please enter desired modifications
940 Office Create/Modify

Screen: ____ Office: FMS_____

Description: FINANCIAL MANAGEMENT SERVICES_____

Manager (PID) : 111111111 MOUSE, MINNIE
Delegates (PID) : 991199119 DUCK, DANGER D, JR
Default Signer(PID): 111111111 MOUSE, MINNIE
```

## Checking Routing Desks for an Individual

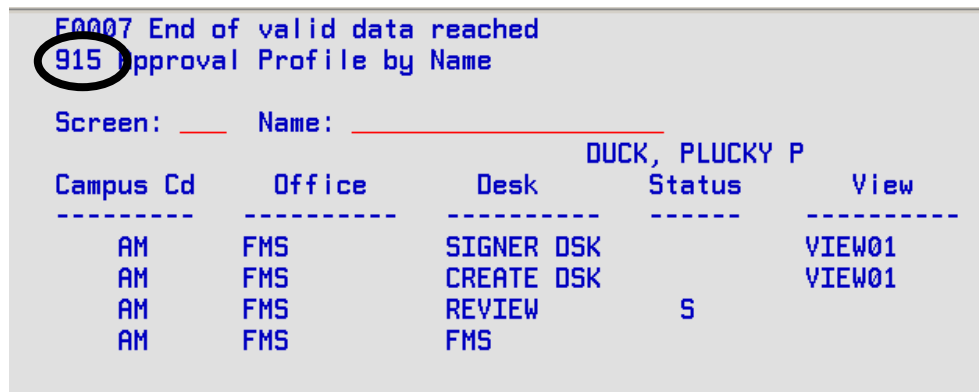
If an individual will create limiteds, exempts, requisitions, approve or sign purchase documents, then the Office Manager/Delegate must add the person to the routing path. FAMIS Security must also give the appropriate screen access as requested on the *FD-825*.

To see if the Office Manager/Delegate has added the person to any desk, use Screen 915. See Figure 4.

1. Proceed to Screen 915.
2. Type in the person's name. Type in the last name first. A list may pop up to select to appropriate person.
3. If nothing appeared below, then the FAMIS contact would need to notify the Office Manager/Delegate to add the person to the routing path.

In Figure 4, Plucky Duck is on four desks. He is a primary signer for accounts tied to View01 in the FMS office. He is on the Create Desk, which will allow him to receive FYA PIPs and access other creator's in-boxes. He is a substitute on an approver desk named "Review" for FMS. He is also either an Office Manager or Delegate on Screen 940, as illustrated by the Office named FMS, Desk FMS.

**Figure 4 – Screen 915**



The screenshot shows the FAMIS interface for Screen 915, titled "Approval Profile by Name". At the top, there is a message "E0007 End of valid data reached" and the screen number "915" is circled. Below the title, there are fields for "Screen:" and "Name:" with a red line indicating the input area. The name "DUCK, PLUCKY P" is entered. Below this is a table with columns: "Campus Cd", "Office", "Desk", "Status", and "View". The table lists four desks for the individual.

Campus Cd	Office	Desk	Status	View
AM	FMS	SIGNER DSK		VIEW01
AM	FMS	CREATE DSK		VIEW01
AM	FMS	REVIEW	S	
AM	FMS	FMS		

## Completing the FD-940 Electronic Office Request

Every department that processes on-line documents must have an *FD-940 Electronic Office Request* on file with FAMIS Security. This form defines who can make changes to the electronic routing path for creating, approving, and signing on-line documents. It also identifies one person who can sign for all documents processed within an electronic office. FAMIS Security enters information from the *FD-940* onto Screen 940.

**If someone listed on the *FD-940* terminates, then submit a replacement as soon as possible. When FAMIS Security removes the person from Screen 940, FAMIS requires a replacement.**

Below are the instructions for completing the *FD-940* along with a sample.

### Part I. Office Defaults

#### Office information

Insert the electronic office name to appear in FAMIS. Office names can be between 1-10 characters. Insert the description for the electronic office. Check the appropriate action for FAMIS Security to take with this office: no change, add or delete the office. No change means that the office name and description will not change.

- Use Screen 941 to find the department's electronic office name.
- On Screen 941, enter the department or department/sub-department. Press enter.
- The office name assigned to the department/sub-department will appear on the screen. In Figure 5, the office name is FMS.

**Figure 5 – Screen 941**

```
F8236 Unit FISC is already in View VIEW01
941 Unit to Office Assignment

Screen: █ Dept: FISC_ SubDept: _____

Name: FINANCIAL MANAGEMENT SERVICES
Dept head: MAYNARD, MARILYN W

Office: FMS_____ Manager:
View : VIEW01

Exec Office:
```

Electronic Office Name	Electronic Office Description	No Change	Add	Delete
FMS	Financial Management Operations	X		

### Defaults to Add and/or Remove

Insert the name and social security numbers of the defaults to add or remove.

- **Office Manager:** The one person who will maintain everything in the electronic office, including signers.
- **Office Manager Delegates:** Assign one or two delegates. The delegate(s) will maintain everything in the electronic office EXCEPT for the signers.
- **Default Signer:** The default signer is someone who can sign for every account tied to this office. Office Managers cannot add/delete themselves from the signer desk. Thus, if the Office Manager can sign for everything, then it is best to add him/her as the default signer to avoid having to do extra paperwork to have Financial Management Operations add him/her to the signer desk.

	Name	SSN
Office Manager:	Minerva McGonagoll	000-00-0000
Office Manager Delegate 1:	Severus Snape	000-00-0001
Office Manager Delegate 2:	Rufus Hagrid	000-00-0002
Default Signer:	Albus Dumbledore	000-00-0000

### Part II. Units To Office Assignment

Insert all department/sub-department codes, e.g., FISC/OPS, to assign to this office. If there are no sub-departments then use "none" as the sub-department.

Dept Code	Subdept Code	Add	Delete	Dept Code	Subdept Code	Add	Delete
FISC	NONE	X					
FISC	OPS	X					

### Part III. Required Signatures

The Dean, Department Head, or Director and the Office Manager must sign the form.

---

## Sample FD-940 Electronic Office Request

### Part I. Office Defaults

#### Office information

Electronic Office Name	Electronic Office Description	No Change	Add	Delete
FMS	Financial Management Operations	X		

#### Defaults to Add

	Name	SSN
Office Manager:	Minerva McGonagall	222-22-2222
Office Manager Delegate 1:	Severus Snape	111-11-1111
Office Manager Delegate 2:		
Default Signer:	Albus Dumbledore	222-22-2222

#### Defaults to Remove

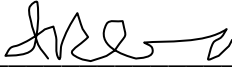
	Name	SSN
Office Manager:	N.O. Manager	333-33-3333
Office Manager Delegate 1:		
Office Manager Delegate 2:		
Default Signer:	N.O. Manager	333-33-3333


### Part II. Units To Office Assignment

Insert all department/sub-department codes, e.g., FISC/OPS, to assign to this office. If you do not have any sub-departments then use "none" as the sub-department.

Dept Code	Subdept Code	Add	Delete	Dept Code	Subdept Code	Add	Delete
FISC	None	X					
FISC	OPS	X					

### PART III. Required Signatures. *Both signatures are required.*

Date 3-5-02 Printed Name Minerva McGonagall Signature   
 Dean, Department Head or Director

Date 3-5-02 Printed Name Albus Dumbledore Signature   
 Office Manager

**You, the FAMIS Security Contact, are the most important link between the Security and Training group and the FAMIS community at TAMU**

Without your diligence and communication, we would be unable to provide FAMIS access to the vast majority of FAMIS users.

It's our goal to make sure every FAMIS user on campus has the Fiscal Computing System access they need to do their work. To meet that ambition, we need you to help us. Constant, open communication, wherever and whenever possible, is the best way that together we can achieve that goal.

