

# Electronic Office Management Glossary

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

**authorization (admin) view.** A group of units and/or accounts that allows office managers and delegates to control what accounts users can view and/or update. When a unit is assigned to an electronic office, an authorization view for that unit is automatically generated. A unit or account can be in more than one authorization view.

**billing code.** A code that represents a university department or area and is created and controlled by the Centralized Receivables section in the Office of Accounting and Financial Management. Departments and offices typically use billing codes in order to post bills and receive payments online for things like lost equipment or study abroad costs.

**command.** 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 linked desks/views. See [command status](#) for levels of command authorizations.

**command status.** The level of authorization granted to linked desk/views. 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

**creator desk.** The desk on which a form (document) is created.

**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. The office which owns the unit creates and updates this type of routing.

**delegate.** An assistant to the 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.

**departmental coding.** Optional system of coding used by departments to categorize and organize transactions. A code is an identifier that represents detailed information and is associated with transactions at the time of posting. Departmental coding is only available in **US1** in \*DEFINE.

**departmental routing.** A type of document routing that controls the desks and circumstances in which forms (documents) will route for departmental approvals.

**desk.** A group of people. 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.

- normal: approval by a desk assignee is required for the document to continue routing.
- notify: desk assignees receive informational copies of documents to their inboxes, regardless of whether they have previously seen the document.
- FYI: desk assignees receive informational copies of documents to their inboxes only if they have not already seen the document.

**desk assignee.** Individual assigned to a desk.

**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).

**EOM.** The Electronic Office Management application.

**form.** A three-character name associated with a particular electronic document. "Form" and "document" are often used interchangeably. Form names are the same as the command names that generate these documents.

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

**hierarchy type.** Refers to the type of hierarchy a unit falls under — funding, organizational, or both.

**linked desk/view.** The set of command authorizations provided to a group of people (the desk) when working with a specific group of accounts (the authorization view). Individuals may have to use different linked desks/views to accomplish different tasks.

**mainframe logon ID.** A four- or five-character code used to identify a user who has access to the mainframe. All individuals who have access to mainframe systems, including \*DEFINE and \*NRRECS, have mainframe logon IDs that are associated with their [UT EIDs](#).

**masking.** A method of including multiple forms or accounts when setting up [routing views](#) or [authorization \(admin\) views](#) and when setting up [departmental](#), [dean/vp](#), or [processing department](#) routing sequences. Periods (.) are entered as placeholders to include all [accounts](#) within a budget group (12345678..) or all lower-level [forms](#) (V., VP., etc.).

**nonaccount-based routing.** A type of routing used by WORQS Electronic SR10 forms. Nonaccount-based routing uses desks but is independent of accounts, authorization views, and routing views. Nonaccount-based routing is managed through the UT Department system and uses desks only as a level of approval. Desks linked to an authorization view can be used in nonaccount-based routing, but the account-related information is ignored.

**official unit.** An official academic or administrative university entity. Unit codes of official units end in "-000." Official units are further 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 department routing.** A type of document routing that controls the approvals required on an electronic document after the document is received by the processing unit. The processing unit sets up and maintains this routing.

**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. Examples of processing units are Accounts Payable, Budget, Payroll, and Purchasing.

**purchasing center.** A code used to identify a department, or an area/section within a department, that is using the automated purchasing system.

**routing.** Controls the approvals required on electronic documents. Routing setup is very flexible and can be established for different document types and/or accounts. There are three levels of routing: [departmental](#), [dean/vp](#), and [processing department](#).

**routing (master) 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.

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

**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.

**special authorizations.** Authorizations for a linked desk/view that grant hierarchical viewing access to any units that report to units in the authorization view. Special authorizations are limited to certain commands and are assigned separately from command authorizations.

**substitute.** A designation given to a desk assignee. Documents are not sent to a substitute's inbox; however, the substitute can still process documents and have the same authorizations as the other desk assignees.

**subunit.** A subdivision of an official unit. Unit codes of subunits end 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.** An official university department or organization (official unit) or projects, programs, or principal investigators (subunits). Each unit is represented by a seven-digit unit code. See also [official unit](#), [subunit](#) and [unit code](#).

**unit code.** The seven-digit code assigned to a unit. The first four digits represent the official unit; the last three 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. For additional information about EIDs, please visit the [ITS Web site](#).