Electronic Approval Paths

The **Electronic Approval Paths** documentation will explain the need for approval tables and how they are used in the IBIS system.

The **Electronic Approval Paths** documentation contains the following sections:

Introduction to Approval Paths

What is an Approval Path and How Forms Flow

An approval path needs to be put in place so that electronic forms will route through the required approvers. The Financial Officer sets up the approval path as specified in [Appendix 23](#) in the **General Forms Usage Guide** and [FN18](#) in the **Policy Manual**. All of the required approvers must be in the approval path and the Financial Officer is usually the last approver.

When a form is added, the unit or mnemonic associated with the budget number will be entered on the form. This unit has an approval path on which the form will route for approval. When the form is submitted it will route to the first level or step of approvers. If a path is not in place for a unit or mnemonic for that particular form, the message **"No Path Record Found"** will appear at the top of the form.

If an approval path is not set up for a mnemonic or unit, the system will automatically check the higher mnemonics to see if there is an approval path. If a higher level path exists, the form will route on that approval path.

Example: Mnemonics

    HIGHER
    0202435 UP
    0202436 UP

        HIGH
        0203501 UP
        0203512 UP

                LOWER
                0104222 UP
                0104225 UP

If a form was added and submitted on a budget in the LOWER mnemonic but there is no approval path for the LOWER mnemonic, the system will automatically move up the mnemonic structure to find an approval path. The system will check the HIGH mnemonic. If the HIGH mnemonic does not have an approval path for that particular form, the system will then check the HIGHER mnemonic for a path. If the HIGHER mnemonic has an approval path, the form will route on that path for approval.

> **Note:**
A **WAGC** form will **not** check for an approval path on a higher level mnemonic. When you use the WAGC form, an approval path must be in place for that mnemonic or unit, or enter the budget of the mnemonic you want the form to route on for approval.

Structure of an Approval Path

```
   12/07/98                      E A S Y                       ILDP
   11:34:11.5               LIST DEPARTMENT PATHS               DAM3

  Org Unit:❶UTRAVEL   Path:❷R6 Steps❸ Phase 1:❹ Phase 2:❺ Encumbrance: 2❻
  Forms: ❼EQ VRES




  Comments:  TRAINING 11/2❽
  Approval Designation Table —  Phase 2❾
  Step Authorizations ❿
    1  ⟋SJJ2         SDR1    ⟋SDR1/SJJ2⟍
   ⓫⟨        ⓯⟋     ⟍   ⓬      ⟍     ⓮
    2   SDR1      ⟍ SJJ2     SDR1/SJJ2⟋
       50                   50
    9        ⓭ RXS1



  NEXT FUNCTION: _____  〈MENU,KEYS,END〉
```
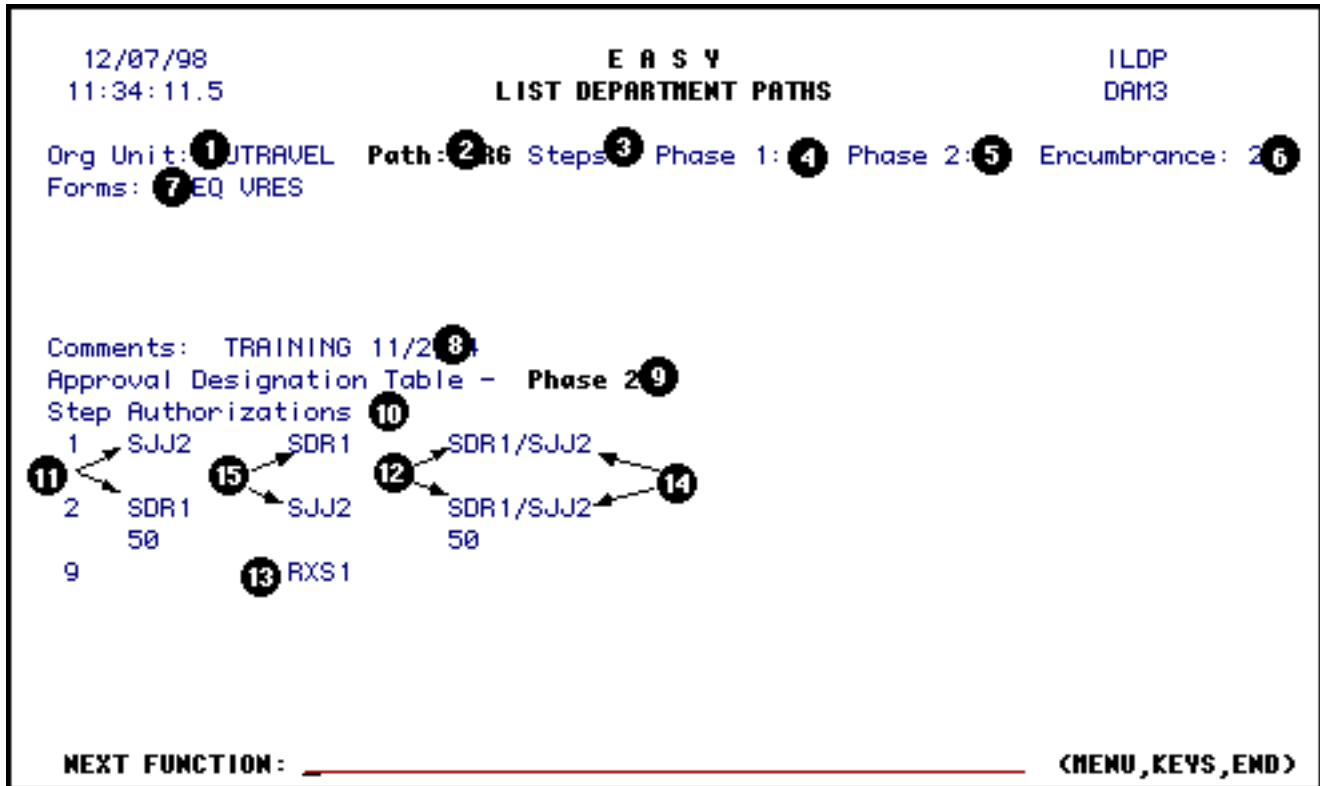
1. The **Organizational Unit** is the mnemonic or department associated with a budget or budgets which are entered in the form. Once the form is added, the organizational unit associated with the budget number entered will appear on the form.

2. The **Path** is the name the Financial Officer has entered for a particular approval table.

   Example:
   If the Financial Officer has all financial forms on one path and all personnel forms on another, the Financial Officer might name one path FIN and the other PER respectively.

3. The **Steps** indicate the number of levels or approvals that must be obtained.

4. **Phase 1** is optional; the approvers in this path are not required by University policy to approve a specific form. Departments may use this Phase 1 path to include additional approvers.

   > Note:
   The Financial Officer can set the approvers on the Phase 1 path separate from the required approvers on Phase 2 or include them on the Phase 2 path. If a Phase 1 path is set up, the form will flow through the Phase 1 approvers and then automatically flow through the Phase 2 approvers.

See the [Phase 1 Functions](#) section for more information.

5. Every approval path must have **Phase 2** approvers. This indicates the number of required approvers on the form.

6. **Encumbrance** indicates the approval level at which the form will post to the IBIS Financial System.

7. **Forms** indicates which forms will flow through this approval path.

8. **Comments** can be entered by the Financial Officer when creating the path.

9. The **Approval Designation Table** indicates which Phase of the approval table you are currently viewing.

10. The **Step numbers** indicate the number of levels in the approval path and who the approvers are at each level. The number of steps should be the same as the number entered for that phase.

    Example:
    If the number entered at Phase 2 is two, the total number of steps or approval levels entered should be two.

    > Note:
    Do *not* include the Level 9 as a step. Level 9s are not approvers and therefore should not be considered as an approval step.

11. If a form is added, submitted and/or approved without any variations, the form will automatically go to the userID that is on the left side of the approval table. These users are called **default approvers** because the form automatically "defaults" to them.

12. The **delegator** authorizes having a proxy. The proxy can approve forms that are awaiting the delegator's action. The delegator is the userID on the left side of the **"/"**.

13. The **Level 9 person** does **not** approve forms. Usually the people who add and submit forms, but do not approve the forms, are entered on the path as a Level 9. Level 9s are placed on the path so they can view the form after it has been added.

    > Note:
    Confidential forms can only be viewed by people listed on the approval path.

14. Anytime a **"/"** is present on the approval path, it means the person on the right side of the **"/"** can

approve forms for the delegator (userID) on the left side of the **"/"**. This person is called a proxy. If a form is awaiting the delegator, the proxy can **Perform a PRoxy Role** (**PPRR**) and approve the form.

> **Note:**

Once the proxy has approved the forms waiting the delegator, the proxy must use **EPRR** to **End PRoxy Role**.

15. Any userID that is placed to the right of the default approver and that does **not** have a **"/"** is an optional or non-default approver. A form can be sent directly to the optional approver instead of the default by placing the optional userID at **Next Approver** on the form. The form can also be **RER**outed to the optional approver if it was sent to the default by mistake.

Create Functions

When to Create an Approval Path

- When an electronic form is going to be submitted and an approval path is not set up for that form, a path will need to be created. If an approval path already exists with the required approvers, the form simply needs to be added to the existing path. See How to Update an Approval Path for more information on adding forms to an existing approval path.

How to Create an Approval Path (CAPA)

- Select **CCOM** from the **Net-Pass Activity Table** to go into the production environment.

- Select **IBIS Admin Menus** at the **Com-Pass** screen.

- At **Next Function**, type **M2AS**. Press **Enter** to get into the **EASY Electronic Approval System**.

- At **Next Function**, type **M3P2**. Press **Enter** to get into the **Path Maintenance Phase 2** function.

- At **Next Function**, type **CAPA**. Press **Enter**. A blank **Create Approval Path** screen will appear, ready to be completed.

```
PLEASE ENTER PATH INFO
   12/07/98                        E A S Y                      CAPA
   13:06:17.7                 CREATE APPROVAL PATH               DAM3


 Approval For Organizational Unit - ❶travel      Path Id: fin ❷

    Forms: ❸eq   vres   purc   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____
           ____   ____   ____   ____   ____   ____   ____   ____   ____   ____

 Nbr of Steps:  Phase 1 (optional): _   Phase 2 (required): 2 ❹

 At what step of Phase 2 should encumbrance occur: 2 ❺

  Description: Financial Forms Path ❻_____

  NEXT FUNCTION: _____  (MENU,KEYS,END)
```

1. At **Approval for Organizational Unit**, enter the organizational unit or mnemonic associated with the budget used on the electronic form.

   Example:
   UTRAVEL is the organizational unit for budget 0104248 UP

2. At **Path ID**, enter a name to identify the approval path.

   Example:
   FIN is used for financial forms.

3. Enter the **Forms** that will go through this particular path for approval.

   Example:
   GREQ, VRES, PURC.

4. At **Phase 2**, enter the number of levels or approvers that are going to be on the path. Refer to Appendix 23 in the **General Forms Usage Guide** for additional information on the authorized approvers for all EASY forms.

   > Note:
   Do **not** include Level 9.

2 means two levels or steps of approvers.

5. **At What Step of Phase 2 Should Encumbrance Occur**, indicate at which approval level these forms should be encumbered. After the approver on the encumbrance step approves the form, the form will be encumbered unless there is an overdraft control and insufficient funds to cover the expense.

   > Notes:
   If the encumbrance is **successful**, it will **post to IBIS Financial**.
   ○ If the encumbrance is **unsuccessful**, the form will **return to the encumbrance step approver** to make the necessary adjustments (take the controls off or put more money in the controlled line) so that the form can encumber successfully.

   Example:
   2 means the encumbrance will occur after the 2nd approval.

6. Enter a brief **Description** of the approval table you are setting up.

   Example:
   Financial Forms Path.

   Press **Enter** and the shell of your approval table is done. The message, **"Record Has Been Created"** will appear at the top of the screen.

When to Add Default and Optional Approvers

- If a path is being created.

- If a path already exists but a new approver needs to be added.

How to Add Default and Optional Approvers (AAP2)

- At **Next Function**, type **AAP2**. Press **Enter**.

This will bring up the **Add Approvers Phase 2** screen.

```
PLEASE ENTER APPROVER INFO
   12/07/98                    E A S Y                      AAP2
   13:12:39.3            ADD APPROVERS PHASE 2               DAM3



Approval For Organizational Unit - utravel①


       Path Id: fin②

    Approval -   Phase: 2 (required)  Step: 1 (9 means inquiry only)③

  Approver Id: axj2④Default Approver For This Step:⑤(D or N)

Dollar Limit: 5000_⑥(Blank or zero means unlimited)

 Description: Budget Executive.⑦_____




  NEXT FUNCTION: _____ (MENU,KEYS,END)
```

1. At **Approval For Organizational Unit**, enter the name of the organizational unit on the approval path that you want to modify.

   Example:
   UTRAVEL

2. At **Path ID**, enter the name of the approval path that you want to modify.

   Example:
   FIN

3. Indicate the **Step** or level at which this individual will approve the form.

   Example:
   1

4. At **Approver ID**, enter the approver's userID.

   Example:
   AXJ2

5. At **Default Approver For This Step**, enter a **D** if this individual is going to be a default approver for this step or level. If the individual is going to be an optional or non-default approver, enter **N**.

6. If the approver is only authorized to approve forms within a certain dollar amount, enter that amount at **Dollar Limit**.

   > Note:
   Do **not** enter commas or cents. The dollar limit field is optional and does not need to be completed.

   Example:
   5000 (the approver can approve up to $5000)

7. Enter a **Description** for this approver.

   Example:
   Budget Executive

   > Note:
   There can only be 9 approvers on each level, including proxies.

   Press **Enter** and the message, **"Record Has Been Created"** will appear at the top of the screen.

   > Note:
   This process can be repeated to add as many approvers as needed.

When to Delegate Proxy All

- If you want someone to approve forms as a proxy on every approval table that the approver is on, use the **Delegate Proxy All** function.

How to Delegate Proxy All (DPA2)

- At **Next Function**, type **DPA2**. Press **Enter**.

This will bring up the **Delegate Proxy All Phase 2** screen.

```
  12/07/98                          E A S Y                          DPA2
  13:16:59.9              DELEGATE PROXY ALL PHASE 2                  DAM3




  PLEASE TYPE IN USER ID OF PERSON DELEGATING PROXY: axj2 ❶


                PLEASE TYPE IN USER ID OF PROXY: abc3❷










  NEXT FUNCTION: _____  <KEYS,MENU,END>
```

1. Enter the **userID** of the person **delegating proxy** (the person who will be proxied).

   Example:
   AXJ2

2. Enter the **userID** of the person that **will act as proxy**.

   Example:
   ABC3

   Press **Enter**. The system will delegate the proxy for every occurrence of the approver across all approval paths.

   This screen indicates that the delegation was performed.

   > Note:
   Some proxies may be denied if 9 approvers and/or proxies already appear on one level. You must delete one of the approvers and/or proxies listed before this proxy can be delegated.

When to Delegate Proxy Selected

- If you want to selectively choose the approval paths the proxy will appear on, use **Delegate Proxy**

Selected Phase 2 function.

How to Delegate Proxy Selected (DPS2)

- At **Next Function**, type Press **DPS2**. Press **Enter**.

This will bring up the **Delegate Proxy Selected Phase 2** screen.

```
 12/07/98                         E A S Y                      DPS2
 13:22:43.3            DELEGATE PROXY SELECTED PHASE 2          DAM3




 PLEASE TYPE IN USER ID OF PERSON DELEGATING PROXY: sjj2 ❶


              PLEASE TYPE IN USER ID OF PROXY: sdr1 ❷








 NEXT FUNCTION: _____   (KEYS,MENU,END)
```

1. Enter the **userID** of the approver **delegating proxy** (the person granting proxy).

   Example:
   SJJ2

2. Enter the **userID** of the person who **will act as proxy**.

   Example:
   SDR1

   Press **Enter**.

```
  12/07/98                          E A S Y                            DPS2
  13:20:21.5           DELEGATE PROXY SELECTED PHASE 2                 DAM3

  Delegate $ Limit  ORGANIZATIONAL UNIT   PATH PHASE STEP APPROVER   DEF
    (D)
    ❸       ❹                UTRAVEL          TRG    2    1    SJJ2       D

    _       ____             UTRAVEL          TRG    2    2    SJJ2       N

    _       ____

    _       ____

    _       ____

    _       ____

    _       ____

    _       ____

  NEXT FUNCTION: _____  (KEYS,MENU,END)
```

3. Enter a **D** for each approval path where you would like the proxy to appear.

   Example:
   D

4. If there is a **dollar limit for the proxy**, enter the amount at **$ LIMIT**. This means that the proxy may only approve forms up to that dollar limit. If a form is more than the indicated dollar limit, the proxy will **not** be able to approve the form.

   > Note:
   Do **not** enter commas or cents. The dollar limit field is optional and does not need to be completed.

   Example:
   5000

Once all paths are selected for the proxy, press **Enter**. The message, **"Selected authorization delegated to SJJ2 "** (proxy userID entered) will appear at the bottom of the screen .

Update Functions

When to Update an Approval Path

- If you are going to add forms to an existing approval path.

- If you need to delete a form from an existing approval path.

- If you are going to add a level or step of approvers.

- If you are going to delete a level or step of approvers.

- If you are going to change the step at which encumbrance occurs.

How to Update an Approval Path (UPA2)

- At **Next Function**, type **UPA2**. Press **Enter**.

This will bring up the **Update Path Phase 2** screen.

```
ENTER 'CAN' IN THE 'NEXT KEY' BLOCK TO CANCEL CHANGES
   12/07/98                        E A S Y                       UPA2
   13:25:51.3                 UPDATE PATH PHASE 2                 DAM3


 Approval For Organizational Unit -  UTRAVEL      Path Id: TRG

    Forms: ❸REQ    VRES    ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____
           ____  ____  ____  ____  ____  ____  ____  ____  ____

 Nbr of Steps:  Phase 1 (optional): _   Phase 2 (required): 2❹

 At what step of Phase 2 should encumbrance occur: 2❺

  Description: TRAINING 11/2,❻_____
                          ❶         ❷
        NEXT KEY: UTRAVELTRG_____  (ORG UNIT,PATH ID)
   NEXT FUNCTION: _____    (MENU,KEYS,END)
```

1. At **Next Key**, enter the **organizational unit** of the approval path you want to update.

   > Note:
   The organizational unit must be 7 characters long. It may be necessary to add spaces at the end of

the unit name to make it 7 characters.

2. Immediately after the organizational unit, enter the **path ID**. Do not put any spaces or commas after the unit.

   Example:
   UTRAVELTRG

   Press **Enter** and approval path information will appear.

   > Notes:

3. Forms may now be added or deleted.

4. The number of steps for approval for Phase 2 can be changed.

5. The step that encumbrance occurs can be changed.

6. The description of the approval path can be changed.

Press **Enter** after the changes have been made. The message, **"Record Has Been Updated"** will appear at the top of the screen.

When to Update Default and Optional Approvers

- If an approver changes from default to non-default or vice versa

- If an approver's dollar limit changes.

- If the description of the approver needs to be changed.

How to Update Default and Optional Approvers (UAP2)

- At **Next Function**, type **UAP2**. Press **Enter**.

This will bring up the **Update Approvers Phase 2** screen.

```
12/07/98                        E A S Y                         UAP2
13:30:56.9             UPDATE APPROVERS PHASE 2                  DAM3


Approval For Organizational Unit - _____


       Path Id: ___

    Approval -   Phase: 2 (required)  Step: _ (9 means inquiry only)

   Approver Id: ____    Default Approver For This Step:❻ (D or N)

 Dollar Limit: _❼___ (Blank or zero means unlimited)

   Description: _❽_____

                ❶   ❷   ❸   ❹   ❺
                 \    \   \   \   \
                  \    \   \   \   ↓
    NEXT KEY: UTRAVELTRG21axj2_____ (ORG UNIT,ID,PH,STEP,APPR)
    NEXT FUNCTION: _____ (MENU,KEYS,END)
```

1. At **Next Key**, enter the **organizational unit**.

   > Notes:
   - Do **not** put spaces or commas between each item.

   - The organizational unit must be 7 characters long. If it is not, enter enough spaces after the unit name to total 7 spaces.

     Example:
     UTRAVEL

2. Immediately after the organizational unit, enter the **path ID**.

   Example:
   UTRAVELTRG

3. Enter a 2 for **Phase**.

   Example:
   UTRAVELTRG2

4. Enter the **number of the approval path step** on which the approver appears.

5. Enter the **approver's userID**.

Press **Enter** and the approver's information will be displayed.

> Notes:

6. The approver can be changed to a default or non-default approver.

7. The approver's dollar limit can be changed.

8. The approver's description can be changed.

Press **Enter** to process the updated information. The message, **"Record Has Been Updated"** will appear at the top of the screen.

Cancel Functions

When to Cancel Default and Optional Approvers

- If a person will no longer approve the forms listed on the approval path.

- If a person terminates or moves to another job and no longer approves forms for an area.

How to Cancel Default and Optional Approvers (CAP2)

- At **Next Function**, type **CAP2**. Press **Enter**.

This will bring up the **Cancel Approvers Phase 2** function.

```
ENTER 'CAN' IN 'NEXT KEY' TO CANCEL APPROVER
   12/07/98                    E A S Y                      CAP2
   13:40:38.9          CANCEL APPROVERS PHASE 2             DAM3



   Approval For Organizational Unit - UTRAVEL


        Path Id: TRG

     Approval -    Phase: 2 (required)   Step: 2 (9 means inquiry only)

   Approver Id: SDR1    Default Approver For This Step: D (D or N)

   Dollar Limit: 50____ (Blank or zero means unlimited)

   Description: TRAIN_____
                  ❶  ❷ ❸  ❹  ❺



      NEXT KEY: UTRAVELTRG22SDR1_____ (ORG UNIT,ID,PH,STEP,APPR)
      NEXT FUNCTION: _____ (MENU,KEYS,END)
```

1. At **Next Key**, enter the **organizational unit**.

    > Notes:
    ❍ Do **not** put spaces or commas between each item.

    ❍ The organizational unit must be 7 characters long. If it is not, enter spaces after the unit to
       total 7 spaces.

       Example:
       UTRAVEL

2. After the organizational unit enter the **path ID** of the approval table.

    Example:
    UTRAVELTRG

3. Enter a 2 for **Phase**.

    Example:
    UTRAVELTRG2

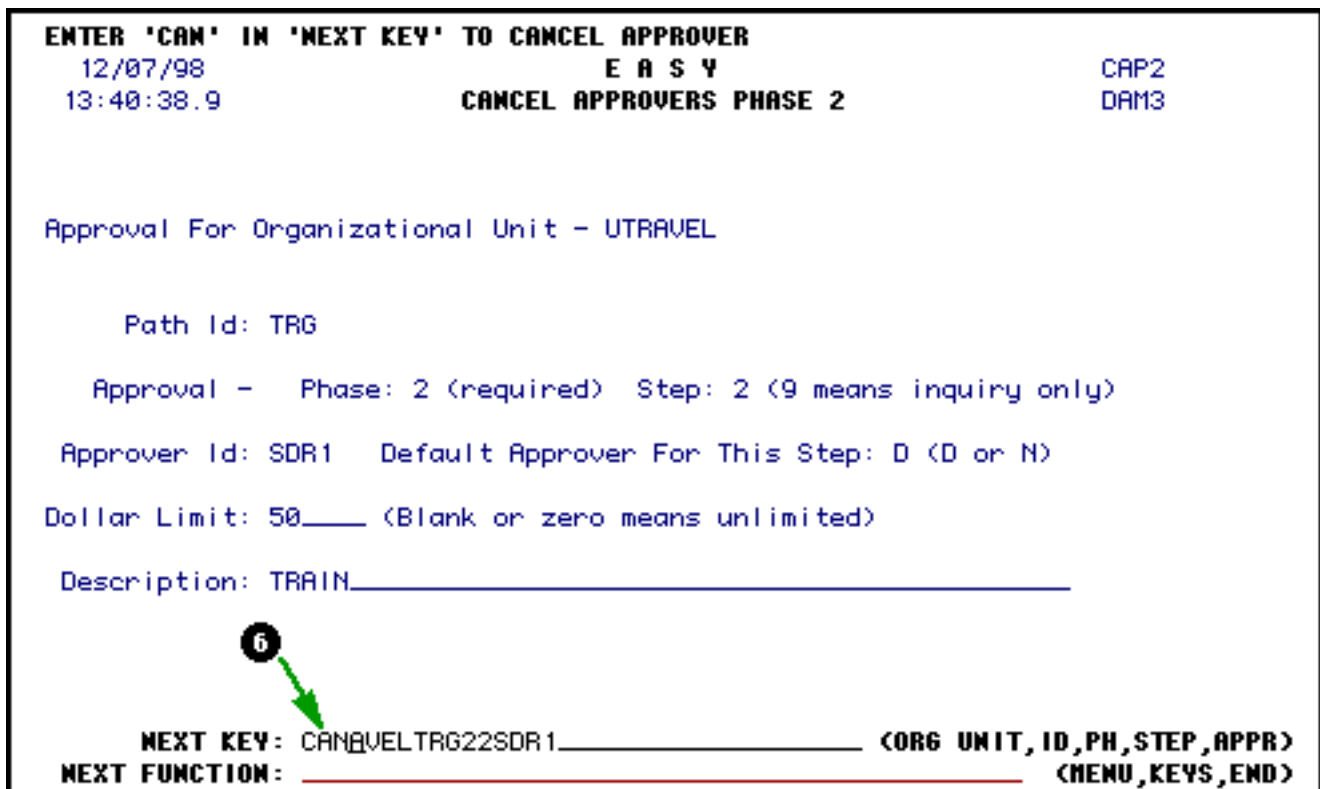4. Enter the **number of the approval path step** on which the approver appears.

    Example:

UTRAVELTRG21

5. Enter the **approver's userID.**

   UTRAVELTRG21SDR1

   Press **Enter** and the approver's information will display.

```
ENTER 'CAN' IN 'NEXT KEY' TO CANCEL APPROVER
   12/07/98                        E A S Y                      CAP2
   13:40:38.9            CANCEL APPROVERS PHASE 2                DAM3



Approval For Organizational Unit - UTRAVEL


     Path Id: TRG

   Approval -   Phase: 2 (required)  Step: 2 (9 means inquiry only)

 Approver Id: SDR1   Default Approver For This Step: D (D or N)

Dollar Limit: 50____ (Blank or zero means unlimited)

 Description: TRAIN_____

                  ❻

     NEXT KEY: CANAVELTRG22SDR1_____ (ORG UNIT,ID,PH,STEP,APPR)
    NEXT FUNCTION: _____ (MENU,KEYS,END)
```

6. At **Next Key**, type **CAN** (over the information you just entered) and press **Enter**.

A message will appear at the top of the screen indicating **"You Have Just Deleted the Default Approver."**

When to Revoke Proxy All

- If you want to revoke a proxy from all approval paths, use the **Revoke Proxy All Phase 2** function.

How to Revoke Proxy All (RPA2)

- At **Next Function**, type **RPA2**. Press **Enter**.

This will bring up the **Revoke Proxy All Phase 2** screen.

```
12/07/98                        E A S Y                          RPA2
13:48:59.4             REVOKE PROXY ALL PHASE 2                   DAM3




        PLEASE TYPE IN USER ID OF PERSON REVOKING PROXY: axj2 ❶


        PLEASE TYPE IN USER ID OF PROXY BEING REVOKED: dee2 ❷









   NEXT FUNCTION: _____ (KEYS,MENU,END)
```

1. Enter the **userID** of the **approver revoking proxy** (person who is being proxied).

   Example:
   AXJ2

2. Enter the **userID** of the person or proxy **that is going to be revoked**.

   Example:
   DEE2

   Press **Enter**. Proxy will be revoked for every occurrence of the approver across all approval paths.

   The screen indicates that the proxy delegation has been revoked for these paths.

   Press **Enter** to continue.

When to Revoke Proxy Selected

- If you want to selectively choose the approval paths from which a proxy will be revoked, use **Revoke Proxy Selected Phase 2** function.

How to Revoke Proxy Selected (RPS2)

- At **Next Function**, type **RPS2**. Press **Enter**.

This will bring up the **Revoke Proxy Selected Phase 2** screen.

```
 12/07/98                      E A S Y                        RPS2
 13:52:41.9            REVOKE PROXY SELECTED PHASE 2           DAM3




      PLEASE TYPE IN USER ID OF PERSON REVOKING PROXY: sdr1 ❶


      PLEASE TYPE IN USER ID OF PROXY BEING REVOKED: sjj2 ❷







 NEXT FUNCTION: _____   (KEYS,MENU,END)
```

1. Enter the **userID** of the **approver revoking proxy** (the person who granted proxy).

   Example:
   SDR1

2. Enter the **userID** of the person who is **acting as proxy**.

   Example:
   SJJ2

   Press **Enter**.

```
12/07/98                        E A S Y                         RPS2
13:53:19.2          REVOKE PROXY SELECTED PHASE 2               DAM3

Revoke    ORGANIZATIONAL UNIT    PATH PHASE STEP    APPROVER   DEF   $ LIMIT
(R)
  ❸           UTRAVEL            TRG    2    1     SDR1/SJJ2    N         0

  _           UTRAVEL            TRG    2    2     SDR1/SJJ2    N        50

  _           ECON               TRG    2    1     SDR1/SJJ2    N         0

  _

  _

  _

  _

  _


NEXT FUNCTION: _____ (KEYS,MENU,END)
```

3. Enter an **R** at each approval path where you would like the proxy revoked.

   Example:
   R

Once all paths are selected to revoke proxy, press **Enter**. The message, **"Selected authority revoked for SJJ2 "** (proxy userID entered) will appear at the bottom of the screen.

When to Cancel an Approval Path

- If you are not going to use that approval path again.

How to Cancel an Approval Path (CPAT)

- At **Next Function**, type **CPAT**. Press **Enter**.

This will bring up the **Cancel Path** screen.

```
ENTER 'CAN' IN 'NEXT KEY' TO CANCEL PATH
   12/07/98                         E A S Y                        CPAT
   14:17:07.0                      CANCEL PATH                     DAM3


Approval For Organizational Unit -  UTRAVEL       Path Id: TRG

   Forms: GREQ    VRES    ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____
                          ____   ____   ____   ____   ____   ____   ____   ____

Nbr of Steps:   Phase 1 (optional): _   Phase 2 (required): 2

At what step of Phase 2 should encumbrance occur: 2

 Description: TRAINING 11/2/94_____
                    ❶          ❷
        NEXT KEY: UTRAVELTRG_____  (ORG UNIT,PATH ID)
   NEXT FUNCTION: _____  (MENU,KEYS,END)
```

1. At **Next Function**, enter the **organizational unit** *and* **path ID** of the approval path you wish to cancel.

    > Notes:
    - Do **not** put spaces or commas between each item.

    - The organizational unit must be 7 characters long. If it is not, enter spaces after the unit name to equal 7 spaces.

        Example:
        UTRAVEL

2. Immediately after the organizational unit, enter the **path ID** of the approval path to be cancelled.

    Example:
    UTRAVELTRG

    Press **Enter** and the approval path will appear.

```
ENTER 'CAN' IN  'NEXT KEY' TO CANCEL PATH
   12/07/98                    E A S Y                      CPAT
   14:17:07.0                CANCEL PATH                    DAM3


Approval For Organizational Unit -  UTRAVEL       Path Id: TRG

  Forms: GREQ    VRES    ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____
                         ____   ____   ____   ____   ____   ____   ____   ____

  Nbr of Steps:   Phase 1 (optional): _    Phase 2 (required): 2

  At what step of Phase 2 should encumbrance occur: 2

  Description: TRAINING 11/2/94_____
                     ❸
       NEXT KEY: canAVELTRG_____  (ORG UNIT,PATH ID)
  NEXT FUNCTION: _____  (MENU,KEYS,END)
```

3. At **Next Key**, type **CAN** (cancel) over the information you just entered and press **Enter**.

A message will appear at the top of the screen informing you that the approval path has been cancelled.

How to View an Approval Path (ILDP)

Inquiry List Department Paths — ILDP

If you want to see the approval path that you have created or updated, use the **Inquiry List Department Path (ILDP)** function.

- At **Next Function**, type **ILDP**. Press **Enter**.

```
  12/07/98                        E A S Y                      ILDP
  14:23:03.3                 LIST DEPARTMENT PATHS              DAM3


  Approval For Organizational Unit -  _____①


  Path Id:  __②




  NEXT FUNCTION: _____  <MENU,KEYS,END>
```

1. Enter the **Organizational Unit**. The organizational unit is the "mnemonic" associated with the budget used in the form.

   Example:
   OTC (Office of Telecommunications)

2. The **Path ID** of the approval path may be entered.

   Press **Enter** to view the approval path(s).

   > Note:
   If a **Path ID** is not entered, all of the approval paths associated with that organizational unit will appear sequentially when **Enter** is pressed.

Phase 1 Functions

Listed below is a list of **Phase 1** functions. All of these functions are performed exactly the same as the Phase 2 functions. Follow the steps for the Phase 2 functions but use a 1 in place of 2 when entering the Phase number.

AAP1 Add Approvers to a Phase 1 Path

UPA1 Update a Phase 1 Path

UAP1 Update a Phase 1 Approver

CAP1 Cancel Phase 1 Approvers

DPS1 Delegate Selected Proxy on a Phase 1 Path

DPA1 Delegate Proxy for All Paths on Phase 1

RPS1 Revoke Selected Proxy on a Phase 1 Path

RPA1 Revoke Proxy for All Paths on Phase 1

PC Approval Path Maintenance System

- The **PC Approval Path Maintenance System** was initially developed by the College of Engineering, but is now maintained by Administrative Information Services. The purpose of this program is to allow the user to create and edit IBIS approval paths locally on a PC and upload them via TSO to the mainframe. This program allows you to add a new path, change a current path and delete a path, as well as add, change and delete approvers and proxies.

Last Revised: 10/26/2003