**YB2** electronic "in-box", you have 7 screen views on YB2 screen (See F5 note)

**VER** verify document accuracy

**Action:** "?" will display full list

most frequently used Action commands:

**NEW** create new document

**VER** verify document accuracy

**FYA** approve & route

**FYI** forward document as informational only

**PRT** print document

**DEL** delete

**DIS** discard from "in-box"

**NOT** display doc notes

**ROU** display how doc has been routed

**SEA** search for document: enter 3-letter "Command" code of document type you are searching then "SEA" in "Action:" "F" keys

| F1   | "F" Key menu (also to change desk view/access) |
| F3   | On-line report system (not on the standard list above) |
| F5   | Set screen view criteria |
| F6   | Help for the current screen |
| F7   | Return to main menu |
| F8   | Exit DEFINE |
| F9   | TXMAIL Menu:, screen arrangement |
| F10  | Command Experts/Glossary |
| F11  | Personal note pad page |
| F12  | Office note pad page |
| F15  | List of available reports |

"clear" to go to previous hierarchy command OR Close pop-up screen

**Search Examples:**
- payment
- check
- inventory
- vendor
- GT1

**Image retrieval**
https://utdirect.utexas.edu/acct/image/image_pdf.WBX

**Menus (643 Screens)**

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</table>

**should NOT be used** to print a manual about the 643 commands, very large and difficult to use.
It is better to print the F6 help screen for each screen you are needing to understand.

**HH5** View a list of all commands

**HH7** "Good Morning" screen; notices, training classes, general messages

**HH8** Electronic Office Management
Tells you everything you’d ever want to know about creating and maintaining electronic offices.

**MMM** DEPARTMENTAL FINANCIAL NETWORK - Lists the main *DEFINE menu groups

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**AMM** APPOINTMENTS AND PERSONNEL INFORMATION

**ANM** new appt
   - **ANA** admin/prof
   - **ANC** classified monthly
   - **ANE** extension instructor - grad students 0059, employees 0058
   - **ANF** faculty
   - **ANI** student instructor (teacher's asst, asst instructor)
   - **ANS** student non-teaching
   - **ANH** hourly

**ACM** change appointment
   - **ACA** admin/prof
   - **ACC** classified monthly
   - **ACE** extension instructor
   - **ACF** faculty
   - **ACI** student instructor
   - **ACS** student non-teaching
   - **ACH** hourly

**ALM** display employee & appointment information
   - **AL1** appointment for an employee
     - **B** Biographical information
     - **D** Detail of Appointment
     - **E** Employment information
     - **F** Funds
     - **H** History
     - **N** New Appointment
     - **P** Print
     - **R** Remarks
     - **T** Appointment Change Document
     - **S** Student information
Go to AUR to update reason code
AL2  emp by name
AL3  appts for admin view
AL4  list appointments for accounts
AL4  to get list of salary encumbrances remaining on an account
AHM  info related to appt
AH1  list job classes and titles by job code
AH5  holiday pay amount
ARM  reappt (exceptions: extention instructor & admin/prof)
ARC  classified monthly
ARF  faculty
ARI  student instructor
ARS  student non-teaching
ARH  hourly
ARA  admin/prof
ASM  appt & HRIS  report
AS1  to get printed report of appointments for a month
AUM  appt update commands
CMM  ACCT CONTROL INFO
CAM  ACCOUNT PROFILE
CA3  BUDGET GROUP / ACCOUNT PROFILE
    screen 3, gives overhead rate. Lists all subaccts, put x beside to see rate
EMM  EMPLOYEE INFORMATION MENU
EGM  EMPLOYEE GROUPS & CONTACTS MENU (Electronic Time sheet)
EG1  UPDATE EMPLOYEE GROUPS AND CONTACTS
ETM  EMPLOYEE TIME MENU
ET4  MONTH CLOSURE OR RE-OPENING FOR UNIT
ETA  ENTRY OF MANUAL ADJUSTMENTS
ETB  EMPLOYEE TIME ACTIVITY
GMM  GENERAL ACCOUNTING INFORMATION
GBM  ACCOUNT BALANCE INQUIRIES
GB1  Account Info / Account: balance, Grants & Contracts Specialist, signer
GB2  Account Info / Budget Groups - in "Month" enter "thr" (13th month) for total FY expenditures
    (In "Month" enter "thr" (13th month) for total FY expenditures)
GBS  authorized signers for an account

GEM  ENCUMBRANCE BALANCE INQUIRIES
GE1  Encumbrance Balance for account

GGM  GENERAL INFORMATION INQUIRIES
GG1  TRAVEL - maximum state allowances
GG2  Travel - Distances
GG4  Vendor addresses - by UT EID
GG5  unit code order - Enter unit code in "Misc:", enter "X" beside unit code for contact person including inventory
GG8  Object Codes - Code Order
GG9  Object Codes - Keyword Order
GGV  Vendor ID Request Document - create a new vendor ID

GOM  object code balance
GO1  object code balance for accounts

GO7  Object Codes Permitted on an Account  (Grouped by Voucher types. See list at bottom.)

GTM  transactions inquiries
GT1  transactions by account & date ("F3" for report)

Transaction Status (most common):
  C  completed
  E  display every transaction, regardless of status

GT2  voucher number
GT3  transaction by encumbrance number / purchase order
GT5  transaction by DTN
GT6  transaction by doc ID - check number & status (O=outstanding, P=paid); screen 2 - check cashed date
GT7  search by invoice number
GT8  Transactions by Acct / Object Code
GT9  payments to vendor ID:
      Screen 1 - check print, Screen 2 - check cash date updated 1st of following month
GTB  Transaction by check number or warrant

HDM  DISPLAY DETAILED HELP FOR SPECIFIC ITEMS
HD1  detailed help for unit codes
HD2  detailed help for account numbers
HD3  detailed help for specific offices: starting with first 2 letters in your logon ID, electronic office manager
HD4  detailed help for specific views
HD5  detailed help for specific desks
HD6  detailed help for specific documents IDs
HD7  list all electronic documents available
HD8 display campus mail codes & departments

IMM INFORMATION MODULE
IDM Inventory Building Information
ID1 Location Record

LMM DEPARTMENTAL ACCOUNTING LEDGER
LPM TRANSACTION POSTING
LRM RECONCILIATION WITH OFFICE OF ACCOUNTING
LR1 AUTOMATED RECONCILIATION REPORT
LR5 PRINT VERIFICATION REPORTS

NMM inventory (This is also available in FRMS) https://utdirect.utexas.edu/apps/frms/inventory/
NVM INVENTORY FUNCTION MENU (see inventory status codes list at bottom)

OMM payroll info & vouchering
OCF Payroll Fringe Benefits by Account - use 14 or 21 sub
OC1 view payroll payment record for employee by date
OC2 view payroll detail deductions/additions
OC3 view payroll check information
OCA payroll salary for an account
OV5 Overtime payment documents

PMM PURCHASING
PSM PURCHASING SUPPLIER MENU
PGM VENDOR INFORMATION MENU
PG3 Vendor Name Order
PG4 Vendor Number Order

RMM Receivables module
RG1 Contract & Grants Billing
RG1 Contract Billing History - invoice

VMM voucher processing
VCM cash receipt vouchers

VEM Encumbrance vouchers
VE5 request for travel authorization, RTA (see list of travel codes at bottom of list)
VE6 correction document for the RTA, disencumber

VTM INTERDEPARTMENTAL TRANSFER VOUCHERS
VT3 RTF - INTRA FUND GROUP - 26 ACCTS. - VT3 OBSOLETE

This menu screen is obsolete. Funds transfers are now created/processed through FRMS.
VT5  IDT (InterDepartment Transfers)  
VT6  IDT correction of charges  

VPM  PAYMENT VOUCHERS  
VP1  PO payment request  
VP2  service payment request  
VP3  ET AL PAYMENT REQUEST  
VP5  TRAVEL PAYMENT VOUCHER  
VP6  CENTRALLY BILLED TRAVEL PAYMENT VOUCHER  
VP7  PRO CARD PAYMENT VOUCHER  
VP9  E-BILLING PAYMENT VOUCHER: e-Ship Global  

YMM  your personal module  

YBM  YB2  in box / out box for document processing  

YPM  PERSONAL PROFILES  
YP1  PERSONAL 'START-UP' PROFILE, update purchasing center  
YP2  PERSONAL PROFILES FOR *DEFINE MODULES  
YP3  DOCUMENT APPROVAL CONFIRMATION  

YPM  PERSONAL PROFILES  
YP1  PERSONAL 'START-UP' PROFILE, update purchasing center  
YP2  PERSONAL PROFILES FOR *DEFINE MODULES  
YP3  DOCUMENT APPROVAL CONFIRMATION  

YSM  SECURITY AUTHORIZATION INFORMATION  
YS1  DISPLAY/SELECT PERSONAL AUTHORIZATIONS  

YIM  USER INFORMATION AND REQUESTS  
YI1  USER GROUP MEMBERSHIPS  
YI2  PERSONAL CHECK DEDUCTION INFORMATION  
YI3  PERSONAL MONTHLY PAYROLL NET ESTIMATE  
YI4  PERSONAL APPOINTMENT INFORMATION  
YI5  REQUEST FOR INDIVIDUAL TIME SHEETS, print timesheets  
YI6  PERSONAL LEAVE TIME BALANCES  
YI7  PERSONAL LEAVE TIME ACTIVITY  
YI8  EMPLOYEE INFORMATION SYSTEM  

INTERMEDIATE USERS OF *DEFINE  

Update manual/authorized signers (form)  
http://www.utexas.edu/business/accounting/sign/  

RG1  contract billing history - invoicing  
https://dpweb1.dp.utexas.edu/acct/osp/ -- project history for a PI  

EMM  EMPLOYEE INFORMATION MENU
**EIM** employee information system
**EI1** update employee bio info

**ESM** employee statistics
**ES1** statistics for a job class code

**ETM** EMPLOYEE TIME MENU
**ET1** EMPLOYEE TRANSFERS AND BALANCES - reporting unit
**ETE** print timesheets for other employees

**IF5** order duplicate monthly statements of account (use 3-letter month to order)
**IQ3** locate account numbers for grants by keyword
**PR3** prepaid orders
**UV4** to find out who owns an account (unit head)

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**CODES:**

Voucher Types (object code)
- **L** VPM Check issued for payment
- **S** VPM Warrant issued for payment
- **C** VCM Cash received
- **B** VJB Balance forward entry
- **R** VJR Year-end adjustment
- **O** PBM, VEM, SSA - Emcumbrance
- **T** VT5 Inter-departmental transaction
- **J** AMM, RI1, SC3, SSB, SSC, VJM, VT6 - all other documents

**TRAVEL CODES:**

PURPOSE OF TRAVEL
- **01** ATTEND MEETING, CONFERENCE, ETC.
- **02** CONDUCT LECTURE OR TEACH COURSE.
- **03** PERFORM RESEARCH ACTIVITIES.
- **04** PARTICIPATE OR OFFICIATE IN AN EVENT.
- **05** RECRUIT PROSPECTIVE EMPLOYEE OR STUDENT.
- **06** SITE OR FIELD VISIT.
- **07** SERVE AS EXPERT WITNESS.
- **08** PRESENT ORIGINAL RESEARCH PAPER.
- **09** FUNDRAISING.
- **10** NEGOTIATE A CONTRACT.
BENEFITS TO UT

01 HELP ACCOMPLISH RESEARCH OBJECTIVES.
02 HELP FULFILL CONTRACT PROVISIONS.
03 ENHANCE GRAD/UNDERGRAD CURRICULUM.
04 ENHANCE PERFORMANCE OF JOB DUTIES.
05 ENHANCE UNIVERSITY OPERATIONS.
06 ENHANCE REPUTATION OF THE UNIVERSITY.
07 RAISE FUNDS FOR FACULTY/STUDENT SUPPORT.
99 OTHER (SPECIFY IN MOREABLE)

DISPOSITION OF DUTIES

01 NO CLASSES MISSED.
02 DUTIES ASSUMED BY COLLEAGUES OR STAFF.
03 DUTIES REQUIRE TRAVEL.
04 DUTIES HELD UNTIL RETURN
99 OTHER (SPECIFY IN MOREABLE)

INVENTORY STATUS CODES:

A  Active NU1 (came in through accounting system)
B  Constructed in Dept
C  Current Year
F  Found
G  Gift
I  Inactive because of a disposal or number change
M  Missing
N  Add to
T  Transfer has occurred or CCART NT1 document is Pending
   (if transfer is pending the record will be locked and no updates can be done)
4  Transfer to UT from another agency
*  Corrected - such as a split
!  The record was created in a fiscal year after the command line fiscal year