

# Administration Tab

Review	Reports	Admin	[No Frames]
AP Roles Personal Email Settings	<b>Academic Individual Routing</b>		
	Select Academic: <input type="text"/>		<a href="#">Display</a>
	<hr/>		
<b>Limit Permissions by Form/Department/College</b>			
Select Person: <input type="text"/>		<a href="#">Display</a>	
<hr/>			
<b>Limit Email Received</b>			
Select Person: <input type="text"/>		<a href="#">Go to Email Limit Page</a>	

The administration tab provides three different functions:

**Academic Individual Routing** - Adjusts the home department codes and the primary home department code for individual academic employees. **This function is only available for senate faculty and Specialists in CE as of 3/15/11.**

**Available for users at the Dean's and Vice Provost's levels only:**

**Limit Permissions by Form/Department/College** –Allows a user to limit access for review or approval by a specific Form or for specific Departments or Schools/Colleges.

**Limit Email Received** – indicates what kinds of email a user -does not wish to receive by Form or action type.

The left blue sidebar contains links to the AP Roles web page for users who have permission to update roles, and a link to set one's own limitations of emails.

# Academic Individual Routing

Academic Individual Routing allows for the adjustment to the home department for those with multiple department affiliations. Initial routing is derived from the funding departments as listed in PPS. **This function is only available for senate faculty and Specialists in CE as of 3/15/11.**

## Academic Individual Routing

Select Academic:  [Display](#)

**Faculty Name: TEST, AE**

			Primary	Include
<b>Primary</b>	BIOLOGICAL SCIENCES	MOLECULAR & CELLULAR BIO	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
	MEDICINE	MED:MEDICAL MICROBIOLOGY & IMM	<input type="radio"/>	<input checked="" type="checkbox"/>
	Testing College	Dept of Testing	<input type="radio"/>	<input checked="" type="checkbox"/>

[Click to Add a New Department](#)

This function provides three options for determining the routing of forms for individual academic appointees: setting the primary department, removing departments from the routing process, and adding departments that the person is not affiliated with in PPS.

Changes in routing will not impact documents currently in the routing process due to the inability to match new routing structures to routing that may have already occurred. However documents can be sent back to the submitter and resubmitted in order to generate new routing based on selected changes. A change to the primary home department will change the primary department for all future forms, including the annual outside professional activities report if the report has not yet been submitted for the current year.

			Primary	Include
<b>Primary</b>	Testing College	Dept of Testing	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
	BIOLOGICAL SCIENCES	MOLECULAR & CELLULAR BIO	<input type="radio"/>	<input checked="" type="checkbox"/>
<b>Excluded</b>	MEDICINE	MED:MEDICAL MICROBIOLOGY & IMM	<input type="radio"/>	<input type="checkbox"/>

[Click to Add a New Department](#)

All changes to department routing must be saved by clicking the 'Submit Changes' button. After a change has been made, the primary department will be listed first while any excluded departments will appear at the bottom, separated by a line. These will now be marked as "Excluded".

'Click to Add a New Department' brings up a new screen where a currently existing title code for the person is selected along with the desired home department code. If the person only has one title code then the title code will be displayed.

[Cancel Lookup](#)

**Select Home Department Code and Title Code**

Select Title Code: 3394 ASST PROJECT\_\_\_\_-FISCAL YEAR

Please enter the home department code or all or part of the department name:  [GO](#)

If there's more than one title code listed for an individual, then a drop-down list is provided.

Select Title Code:

Please enter the home department code or all or part of the department name:

- 1144 PROFESSOR - FY -BUS/ECON/ENG
- 3012 -- IN THE AES-BUS/ECON/ENG

Either the home department code (first image below) or all or part of the PPS home department name (second image) can be entered in to the home department field for searching.

Please enter the home department code or all or part of the department name:  [GO](#)

Please select the department from the below matches or search again

[072057 VM: PATHOLOGY, MICRO, & IMMUN](#)

Please enter the home department code or all or part of the department name:  [GO](#)

Please select the department from the below matches or search again

- [049152 MED: PATHOLOGY](#)
- [049052 MED:PATHOLOGY & LAB MEDICINE](#)
- [030300 PLANT PATHOLOGY](#)
- [929390 UCDCM:DERMATOPATHOLOGY SERVICE](#)
- [929698 UCDCM:SURGICAL PATHOLOGY LABORATORY](#)
- [072023 VM: COMPARATIVE PATHOLOGY LAB](#)
- [072057 VM: PATHOLOGY, MICRO, & IMMUN](#)
- [073109 VMTH:PATHOLOGY](#)

The user may click on the desired home department code from the list of departments to add that department to the routing. The department now appears with the words **Not PPS** to indicate that the relationship does not exist in PPS.

			Primary	Include
<b>Primary</b>	Testing College	Dept of Testing	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
	BIOLOGICAL SCIENCES	MOLECULAR & CELLULAR BIO	<input type="radio"/>	<input checked="" type="checkbox"/>
<b>Not PPS</b>	VETERINARY MEDICINE	VM: PATHOLOGY, MICRO, & IMMUN	<input type="radio"/>	<input checked="" type="checkbox"/>
<b>Excluded</b>	MEDICINE	MED:MEDICAL MICROBIOLOGY & IMM	<input type="radio"/>	<input type="checkbox"/>

If the department is later excluded from the routing process it is removed completely. If it is added again it must be added via the 'Click to Add a New Department' option.

			Primary	Include
<b>Primary</b>	Testing College	Dept of Testing	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
	BIOLOGICAL SCIENCES	MOLECULAR & CELLULAR BIO	<input type="radio"/>	<input checked="" type="checkbox"/>
<b>Excluded</b>	MEDICINE	MED:MEDICAL MICROBIOLOGY & IMM	<input type="radio"/>	<input type="checkbox"/>

[Click to Add a New Department](#)

Submit Changes

# Limit Permissions by Form/Department/College

Available for users at the Dean's and Vice Provost's levels only

This function allows a user to limit access for review or approval by a specific Form or for specific Departments or Schools/Colleges.

Select the person and click "Display". This will allow you to see the current Permission or Role the person currently holds and the scope of that role.

## Limit Permissions by Form/Department/College

Select Person:  [Display](#)

**User Name: TEST, EE**

Permission	Scope	Limit Type	Included
AcadPersAnalyst	Campus		

Limit Forms [\[+/-\]](#)

Limit Units [\[+/-\]](#)

Limit Departments [\[+/-\]](#)

Permissions can be limited three different ways: by form, by unit, and by department. If no limitations are entered then the person has full access based on their permission. Any expansion of permission should be carried out by changing the roles for the person. (See the Roles Guide for Forms Online).

All documents will continue to be viewable even though the review function or notification functions are limited. They will not be able to review documents outside of their scope or receive notification about actions outside of their scope.

*If all boxes are checked the user will have no form restrictions*

Permission	Form	Include
DeanAnalyst	Deferral Merit/Promotion	<input type="checkbox"/>
DeanAnalyst	Emeriti Recall	<input type="checkbox"/>
DeanAnalyst	Jr Spec or Courtesy WOS Title	<input type="checkbox"/>
DeanAnalyst	Outside Activity Request	<input type="checkbox"/>
DeanAnalyst	Outside Annual Report	<input type="checkbox"/>
DeanAnalyst	Request for Visiting Appointment	<input type="checkbox"/>
DeanAnalyst	Sabbatic Leave/Leave of Absence	<input type="checkbox"/>
DeanAnalyst	Search Waiver	<input type="checkbox"/>

In the image below the person is performing the AP Analyst review function for the Emeriti Recalls and Visiting Appointment forms.

Permission	Scope	Limit Type	Included
AcadPersAnalyst	Campus	Form	Emeriti Recall
AcadPersAnalyst	Campus	Form	Request for Visiting Appointment

Limit Forms [\[+/-\]](#)

*if all boxes are checked the user will be treated as having no form restrictions*

Permission	Form	Include
AcadPersAnalyst	Deferral Merit/Promotion	<input type="checkbox"/>
AcadPersAnalyst	Emeriti Recall	<input checked="" type="checkbox"/>
AcadPersAnalyst	Jr Spec or Courtesy WOS Title	<input type="checkbox"/>
AcadPersAnalyst	Outside Activity Request	<input type="checkbox"/>
AcadPersAnalyst	Request for Visiting Appointment	<input checked="" type="checkbox"/>
AcadPersAnalyst	Sabbatic Leave/Leave of Absence	<input type="checkbox"/>
AcadPersAnalyst	Search Waiver	<input type="checkbox"/>

At the Dean's level, the functional user can also limit a view by department

At the campus-wide level (Academic Personnel), a person can also be limited by academic unit. Note that for campus-wide users limitation by department is first limited by selected academic units. One must choose an academic unit prior to selecting specific departments.

**User Name: TEST, EE**

Permission	Scope	Limit Type	Included
AcadPersAnalyst	Campus	Unit	17 - LS: HACS
AcadPersAnalyst	Campus	Unit	18 - LS: MATH/PHY SCI
AcadPersAnalyst	Campus	Unit	19 - LS: SOC SCI
AcadPersAnalyst	Campus	Form	Emeriti Recall
AcadPersAnalyst	Campus	Form	Request for Visiting Appointment

Limit Forms [\[+/-\]](#)

Limit Units [\[+/-\]](#)

*if all boxes are checked the user will be treated as having no unit restrictions*

Permission	Unit	Include
AcadPersAnalyst	AGRICULTURE	<input type="checkbox"/>
AcadPersAnalyst	BIOLOGICAL SCIENCES	<input type="checkbox"/>
AcadPersAnalyst	EDUCATION	<input type="checkbox"/>
AcadPersAnalyst	ENGINEERING	<input type="checkbox"/>
AcadPersAnalyst	LS: HACS	<input checked="" type="checkbox"/>
AcadPersAnalyst	LS: MATH/PHY SCI	<input checked="" type="checkbox"/>
AcadPersAnalyst	LS: SOC SCI	<input checked="" type="checkbox"/>
AcadPersAnalyst	MANAGEMENT	<input type="checkbox"/>
AcadPersAnalyst	MEDICINE	<input type="checkbox"/>
AcadPersAnalyst	Testing College	<input type="checkbox"/>
AcadPersAnalyst	VETERINARY MEDICINE	<input type="checkbox"/>

Update Units Included

Limiting permissions to departments works effectively the same way as for forms and academic units.

Permission	Scope	Limit Type	Included
DeanAnalyst	AGRICULTURE	Department	030001 - AG PLANT BIOLOGY
DeanAnalyst	AGRICULTURE	Department	030070 - AG NEUROBIOLOGY, PHYS & BEHAV
DeanAnalyst	AGRICULTURE	Department	030385 - AG EVOLUTION & ECOLOGY

Limit Forms [\[+/-\]](#)

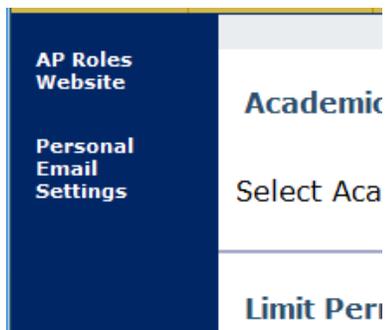
Limit Departments [\[+/-\]](#)

*if all boxes are checked the user will be treated as having no department restrictions*

Permission	Department	Include
<b>AGRICULTURE</b>		
DeanAnalyst	AG & RESOURCE ECONOMICS	<input type="checkbox"/>
DeanAnalyst	AG BIOLOGICAL SCIENCE DO	<input type="checkbox"/>
DeanAnalyst	AG EVOLUTION & ECOLOGY	<input checked="" type="checkbox"/>
DeanAnalyst	AG MICROBIOLOGY	<input type="checkbox"/>
DeanAnalyst	AG MOLECULAR & CELLULAR BIO	<input type="checkbox"/>
DeanAnalyst	AG NEUROBIOLOGY, PHYS & BEHAV	<input checked="" type="checkbox"/>

# Limit Email Received

Users may limit the email traffic they receive from Form Online either by action or by form. Limiting email r begins on the Administration page by either clicking 'Personal Email Settings' in the blue sidebar, by selecting a person's name, or for faculty, by clicking on the 'Personal Email Settings' link in the gold bar. The limit email feature will not suppress weekly email reminders such as inactive documents, and personnel no longer with UC Davis.



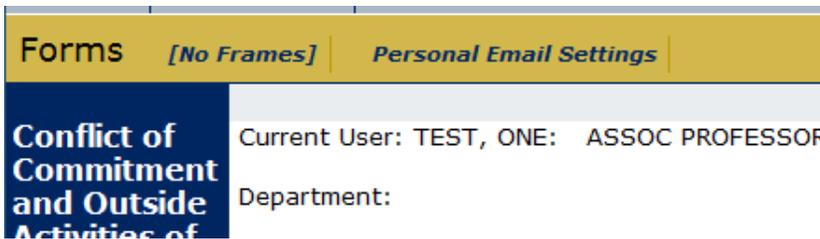
Select personal settings

Select User

Limit Email Received

Select Person:

[Go to Email Limit Page](#)



Faculty member select personal settings

To use the limit email process, indicate which email notifications you would like to exclude. Click on the 'Submit Changes to Limitations' button to save any changes.

**Exclude Email** - indicate below which email to not receive

Name Updating: TEST, THREE

Clear All Form Limitations:

	All Forms	OutActAnn	OutActReq	Leave/Sbtt	SrchWaiver	VisitFac	JrSpc/WOS	Deferral	Deferral	Recall
AllEmail	<input type="checkbox"/>									
Submission	<input type="checkbox"/>									
Ready for Action	<input type="checkbox"/>									
Action Taken	<input type="checkbox"/>									
Returned	<input type="checkbox"/>									
Cancelled	<input type="checkbox"/>									
Decision by Vice Provost	<input type="checkbox"/>									
Decision by Dean *	<input type="checkbox"/>									
Decision by Dept Chair	<input type="checkbox"/>									
Accepted **	<input type="checkbox"/>	<input type="checkbox"/>								
Lv/Sabb Change ****	<input type="checkbox"/>			<input type="checkbox"/>						

\* Actions approved by Dean or Dean's designee (functional Dean).

\*\* Outside Annual reports are accepted by Dean's Office Staff.

\*\*\* The recipients of the email generated on Submission of an Outside Annual Report includes the Department Administrator.

\*\*\*\* Staff changes to a leave/sabbatical request results in an email to the faculty person.

The row 'All Email' can be used to suppress all email from a specific form, while the column 'All Forms' can be used to suppress a specific type of email activity for all forms. For example, if you would like to limit the email for all decisions by the Department Chair, click the checkbox for 'Decision by Dept Chair' in the All Forms column. If you would like to limit this action for only Search Waivers, click the box under the 'SrchWavier' column. Clicking the checkbox for AllEmail/AllForms will suppress all email for all forms. The checkbox above the table labeled 'Clear All Form Limitations' will remove all checked boxes in the table.