



The University of Texas at San Antonio

Introduction to DEFINE Basic Navigating

FOR ASSISTANCE, YOU MAY CONTACT THE FOLLOWING:

Director of DEFINE Administrative Services – ext. 4343
Administrative Systems Specialist - ext. 4556 /4346
Email: DEFINE.Services@utsa.edu

Table of Contents

What is DEFINE?.....	1
What can I do in DEFINE?	1
Difference between UT EID and DEFINE User ID	1
Log in to DEFINE	2
Exit DEFINE.....	4
Password Change	4
Command Area.....	6
Basic Screen Navigation.....	7
How do I get HELP within DEFINE?	7
Menu Structure.....	7
YS1 – Your Desk and View Screen	9
What is a DESK?	9
What is an Administrative View?	9
YB2 – Your Document In-BOX	10
YI8 – Your Employee Information System.....	10
Purpose.....	10
How to Use.....	10
Commonly Used Commands.....	11

What is DEFINE?

DEFINE is a financial application used by various components of the UT System to access Accounting, Budget, Payroll and Human Resources related information. It is an acronym for **DE**partmental **F**inancial **I**nformation **NE**twork.

DEFINE is accessed through UT Austin's mainframe computer. It is a powerful software tool that serves a diverse group of users with various levels of knowledge and a variety of different needs. DEFINE is currently used by the following UT components:

UT-Austin	UT-Pan American
UT-Brownsville	UT-Permian Basin
UT-El Paso	UT-San Antonio
UT Health Sciences Center at Houston	UT-Tyler

What can I do in DEFINE?

DEFINE is a record keeping system that allows users to:

- Create electronic documents. This include appointments (refer to job positions – hired, changed, reclassified, promoted or terminated), payroll vouchers, payment vouchers, request for transfer of funds, cash deposits, Interdepartmental Transfers (IDTs), travel request and travel reimbursements.
- View accounting transactions. Transactions can be viewed by date, voucher number, purchase order number, Departmental Transaction Number (DTN), document ID, vendor ID, and check number.
- View account balances.
- Request Statements of Accounts electronically.
- Search for Vendor Identification Numbers (VIDs) and object codes. Setup new VIDs electronically.
- Look up travel per diem rates and official travel distances from home campus.
- Look up appointment information, including job class codes, titles and campus mail codes.
- View personal check deduction information and calculate personal monthly payroll net estimates.

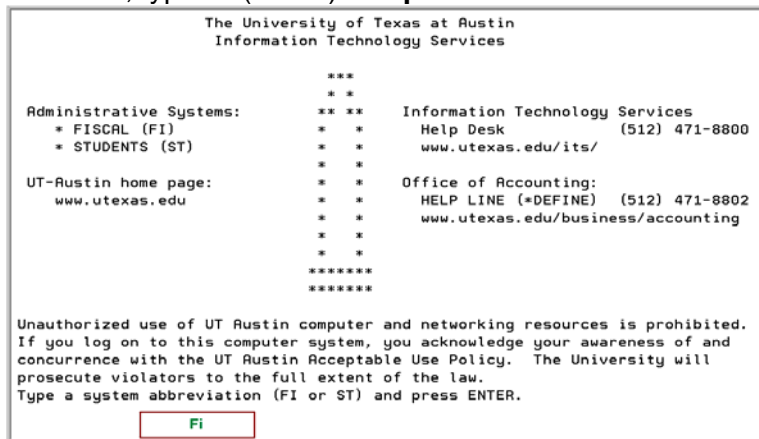
Note: This list is not all-inclusive. As other needs arise, new commands are added; and existing features undergo constant improvement to make users more productive and efficient.

Difference between UT EID and DEFINE User ID

- **UT EID:** The University of Texas Electronic Identifier grants you access to secure services at the University (e.g., UT Direct, UT Touch, DEFINE).
- **DEFINE User ID:** A DEFINE User ID is a four or five character code (e.g., KGXXX) used to grant access to commands and accounts in the DEFINE system. Each user ID is unique and represents the individual who is using the computer. The first two characters (KG) of a user ID represent the electronic office the employee represents. The next two or three characters are usually the person's initials.

Log in to DEFINE

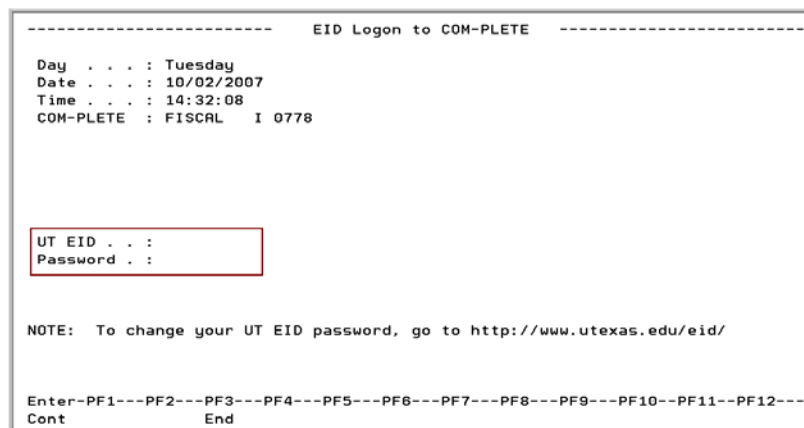
1. To connect to **DEFINE**, double click the **UT Mainframe**.
2. From the UT Tower screen, type **FI** (Fiscal) and **press Enter**.



Note: The application for DEFINE is provided by the Office of Information Technology (OIT). If you have hardware or software problems, you must contact OIT Help Desk at ext. 5538.

3. Type your **UT EID**, then tab to the password field and type your **UT EID Password** and **press Enter**. Your UT EID must be at a High Assurance level to access DEFINE.

Note: If DEFINE is not accessed on a regular basis, the User ID will automatically lock every 45 days. Once your User ID is locked, you will be prevented from accessing DEFINE. To unlock your User ID, call the **DEFINE Administrative Services** at ext. **4556, 4346 or 4343** for assistance.



4. After typing your password and pressing enter, a screen will appear indicating that you have *logged on successfully*.
5. **Press Enter again** to proceed to the COM-PASS screen.

```

KGJBD (UT EID: JD4321 ) has logged on successfully.

                ITS Help Desk                (512) 475-9400
                ITS Computer Equipment Repair (512) 471-0036

Last valid logon was in FISCAL on 08/19/2009 @ 9:49 AM at UTXKB107

Press <ENTER> or enter a new command below:
    -
    
```

6. The COM-PASS screen will list Program Services available to the DEFINE user.
7. To access DEFINE, type **DEFINE** or type the appropriate shortcut key (**C**) under the **Enter Input** field and **press Enter**.

```

10:01:37      TID 739      FISCAL      User KGJBD      08/19/09
                -- COM-PASS --                USTS

                Suspended Programs                Program Services
-----
Programs  Name  C Level  PF  Service Description  Programs  ID  PF
-----
                1      Electronic Mail      TXMAIL    A
                2      Logoff              U          B
                3      ACCT/EMPL/PAYROLL  DEFINE    C
                4      DP User System      DPUSER    D
                5
                6
                7
                8
                9

Enter Input:      HELP      ?
DEFINE or C
    
```

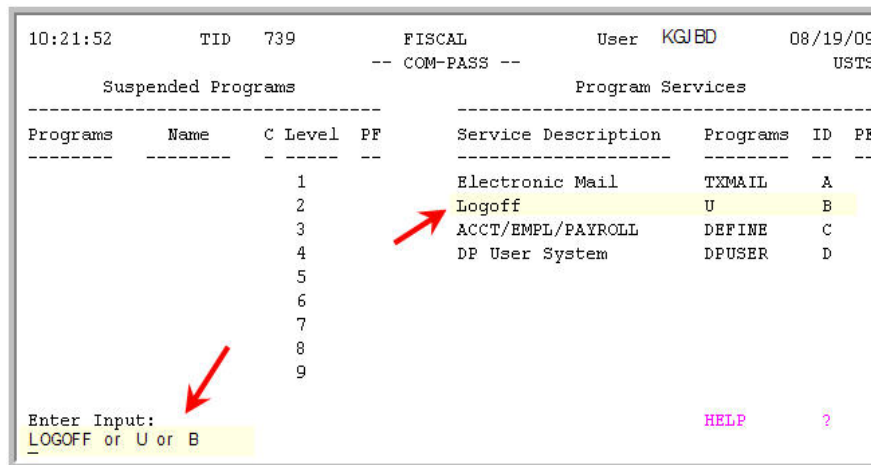
8. Congratulations! You have started your DEFINE session.
- Note:** New DEFINE users may default to command MMM (Main Menu)

```

>>Please enter your next command<<
*DEFINE      DEPARTMENTAL FINANCIAL NETWORK - MMM      Year: 08 09
Command: MMM  Account: _____  Misc: _____  Month: AUG
EID: _____  Inventory: _____  Dept Req: _____  Purch Ctr _____
=====
COMMAND  MENU FOR:                COMMAND  MENU FOR:
-----
1.  AMM APPOINTMENTS AND PERSONNEL I  17. EMM EMPLOYEE INFORMATION MENU
2.  BMM BUDGETING                    18. FMM FACULTY INFORMATION MENU
3.  CMM ACCOUNT CONTROL INFORMATION
4.  LMM DEPARTMENTAL ACCOUNTING LEDG
5.  IMM MANAGEMENT INFORMATION MODUL
    
```

Exit DEFINE

1. To Exit DEFINE, press the **F8** key on your keyboard. This will direct you back to the COM-PASS screen.
2. Next, you must type **Logoff** or type the shortcut key **U** or **B** under the **Enter Input** field and **press Enter**.

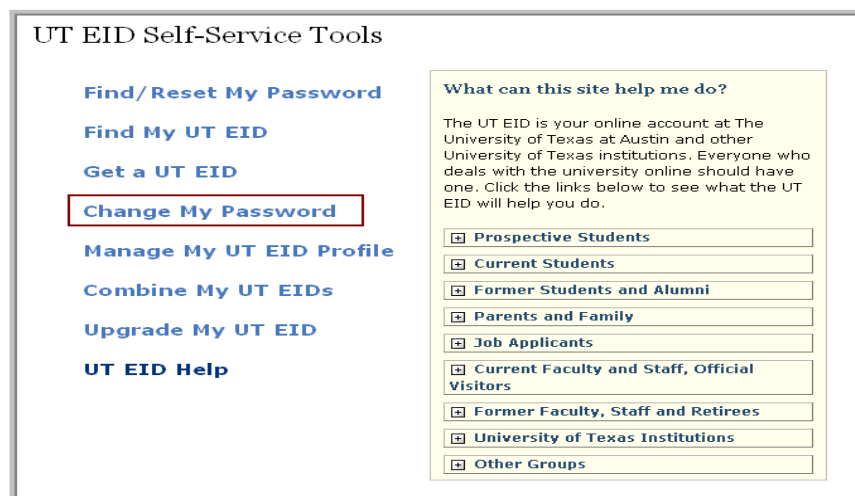


3. A blank screen will appear with the statement, “*The session has been terminated*”. You are now successfully logged out of DEFINE.

Note: The system will automatically disconnect after 30 minutes of inactivity.

Password Change

1. If you wish to change your password at any time you need to go to UT Direct Tools found at: <http://www.utexas.edu/eid>, click on Change My Password.



2. Type your **UT EID** and select **Continue**.

3. Type in the **Current Password**, this will be your temporary password that was issued when you received high assurance.
4. Tab to the **New Password** field and type in a password that conforms to the requirements and then re-enter the new password.
5. Press the **Continue** button.

Password Requirements
Your password **must**:

- Be between **8 and 20 characters** in length.
- Consist of some combination of **letters, numbers, and special characters**. The special characters that are permitted are:
! @ # \$ % & () - + = , < > : ; " ' ..

In addition, your password cannot contain:

- Blanks.
- Your UT EID.
- Your first or last name.
- Your birthday in any form.
- Any words found in the English dictionary or common proper nouns of four letters or longer.
- You may not re-use any of your last 10 passwords.
- You may not re-use any password used in the last 10 days.
- Passwords are case sensitive.

6. If you changed the password successfully, you will see the following message:

Note: After successfully changing your password, you will be instructed to setup three security questions and one free form question. If you forget your UT EID password, you can reset your password by providing the correct answers to your security questions or by contacting **DEFINE Administrative Services** at ext. **4556, 4346 and 4343**.

- After changing or resetting your password, you should go back to **DEFINE** and proceed to login with your **UT EID** and your **new UT EID password**.

```

----- EID Logon to COM-PLETE -----
Day . . . : Wednesday
Date . . . : 08/19/2009
Time . . . : 15:39:28
COM-PLETE : FISCAL I 0969

UT EID . . : 
Password . : 

NOTE: To change your UT EID password, go to http://www.utexas.edu/eid/

Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Cont      End
    
```

Command Area

- The Command Area is the area above the double underline (In this example the Command Area is shaded in blue).
- The Command Area will display the *application name*, *description of the current command*, the *fiscal year*, and the *month*.
- The Message Line is the top line of the Command Area. This line *relays instructions and comments* to the DEFINE user. This area is the *system's voice back to you*. It may tell you to make an entry, confirm your changes, or give you an error message. These messages will always begin and end with double arrows >> <<.

```

>>Please enter your next command<< Message Line
*DEFINE      DEPARTMENTAL FINANCIAL NETWORK - MMM      Year: 08 09
Command: MMM  Account: _____ Misc: _____      Month: AUG
EID: _____ Inventory: _____ Dept Req: _____ Purch Ctr _____
=====
COMMAND MENU FOR:                                COMMAND MENU FOR:
-----
1. AMM APPOINTMENTS AND PERSONNEL I             17. EMM EMPLOYEE INFORMATION MENU
2. BMM BUDGETING                                18. FMM FACULTY INFORMATION MENU
3. CMM ACCOUNT CONTROL INFORMATION
4. LMM DEPARTMENTAL ACCOUNTING LEDG
5. IMM MANAGEMENT INFORMATION MODUL
    
```

- The Command field is a 3-character field in the upper-left corner of the screen. Once you become familiar with the commands in DEFINE, type the command in the Command field and press Enter to go to that screen. In this example the Command is MMM (Main Menu).
- Depending on the command you are using in DEFINE, the Command Area may contain some of the fields listed below:
 - Account:** The Account field is where you will type a 10-digit account number (1912345650) for which you have authorization.
 - Misc:** The Miscellaneous field may have different functions for different DEFINE commands. Sometimes an entry in the Misc field is required. At other times, it is optional. An entry in Misc narrows the range of your data request and saves you several steps to get the information that you want.

- c) **EID:** The EID field is for an individual's UT EID. Social Security numbers may also be entered in this field in place of the EID. This information is mostly required in the payroll and appointment commands.
- d) **Dept Req:** This field is used to enter a department requisition number when creating electronic Small Purchase Order documents.
- e) **Inventory:** This field is used to *enter* the inventory number when working with the inventory module (NMM commands).
- f) **Purch Ctr:** This refers to the Purchasing Center. The Purchasing Center code (U-123) identifies your department. It is required when processing Small Purchase Order documents.

Basic Screen Navigation

It is important to know which keystrokes on your keyboard will do the following:

- To **Move Forward:** Press the Tab key to move forward from field to field in a screen.
- To **Move Backwards:** Press the Shift key while simultaneously pressing the Tab key to move backwards from field to field in a screen.
- To **Return to a Previous Screen:** Press the Pause Break or Clear button to return to a previous screen.

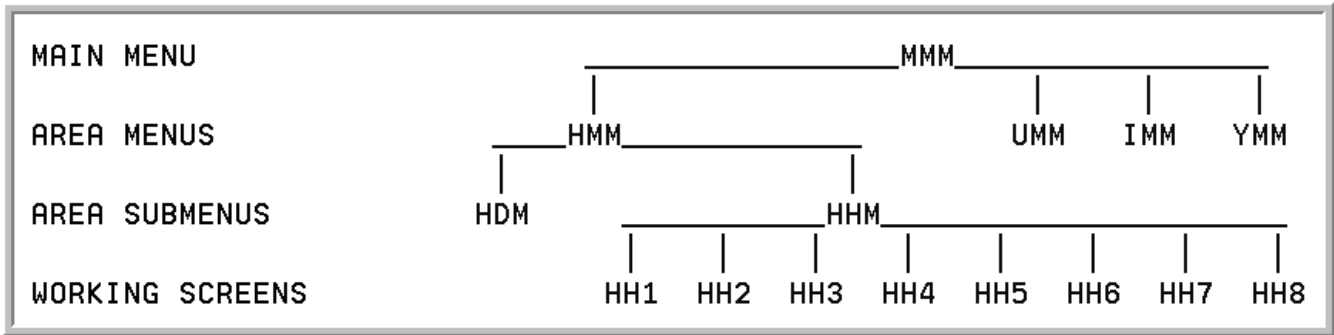
How do I get HELP within DEFINE?

- **? (Field Help):** If you are not sure what to enter in a field, type a “?” in the field and press Enter to access information for valid entries.
- **F6:** The F6 key will provide you with online help about a particular screen or command. By pressing F6, the online help information center will explain why the command is in DEFINE and the purpose of the command.
- **F7:** The F7 key will direct you to the main menu (Command MMM).
- **F8:** The F8 key is used to Exit DEFINE. Refer to the instructions on page 3.
- **F10:** The F10 key is an On-Line Information Center. Use this key to access Glossary Definitions. Type the Term and press Enter to get a definition.
- **DEFINE Administrative Services:** For help with DEFINE, call exts 4346, 4556, 4343 or send an e-mail to define.services@utsa.edu.
- **For Additional Help Use the HHM Submenu Commands:** These commands will aid you in using DEFINE. Commands such as **HH1** (Introduction to DEFINE) and **HH2** (Introduction to Electronic Documents) are short on-line tutorials on using the system.

Menu Structure

DEFINE is divided into operations called commands. Commands are three-character codes which speak the system's language and tell the system to perform a particular activity. All of the commands within DEFINE are organized into a hierarchy.

There are 4 levels of menus in DEFINE: Main Menu (e.g., MMM), Area Menus (e.g., HMM), Area Sub-Menus (e.g., HHM) and Working Screen (e.g., HH1).



Example - Drilling into a Menu:

This example will demonstrate how to drill into the On-Line Help Module.

- a) Starting from command **MMM** (Main Menu), type **HMM** (Area Menu) in the **Command** line and **press Enter**.

Main Menu: The MMM command is the Main Menu of DEFINE. This screen will display all of the Area Menus (also called modules) available to you. It is usually the first screen you see after the "Good Morning" screen - unless you use the YP1 profile. (YP1 is explained in the YMM (Your Personal Module) handout) The MMM menu will vary from person to person because only the commands a user is authorized for are displayed.

```

>>Please enter your next command<<
*DEFINE          DEPARTMENTAL FINANCIAL NETWORK - MMM          Year: 08 09
Command: MMM     Account: _____ Misc: _____ Month: AUG
EID: _____  Inventory: _____ Dept Req: _____ Purch Ctr _____
=====
COMMAND  MENU FOR:          COMMAND  MENU FOR:
-----  -----
1.  AMM APPOINTMENTS AND PERSONNEL I  17. EMM EMPLOYEE INFORMATION MENU
2.  BMM BUDGETING                    18. FMM FACULTY INFORMATION MENU
3.  CMM ACCOUNT CONTROL INFORMATION
4.  LMM DEPARTMENTAL ACCOUNTING LEDG
5.  IMM MANAGEMENT INFORMATION MODUL
  
```

- b) Now that you have selected **HMM**, you have two Sub-Menus to select from (**HHM or HDM**), type **HHM** in the **Command** line and **press Enter**.

```

>>Please enter your next command<<
*DEFINE          ON-LINE HELP MODULE - HHM                    Year: 08 09
Command: HHM     Account: _____ Misc: _____ Month: AUG
EID: _____  Dept Req: _____ Inventory: _____ Purch Ctr _____
=====
COMMAND  MENU FOR:
-----  -----
1.  HHM  OVERVIEW HELP DOCUMENTS AND TUTORIALS
2.  HDM  DISPLAY DETAILED HELP FOR SPECIFIC ITEMS
  
```

- c) After selecting HHM, you have 7 different working screens to select from: **HH1, HH2, HH3, HH4, HH5, HH7, and HH8**. You would type your selection in the command field to move to this working screen.

Working Screens: The working screens are the commands that are used to perform various functions. Some working screens only display information and other screens are for data entry (i.e. electronic documents). Some display commands in DEFINE will show the information on the first screen. On other screens, like the HH1 command, you must take additional action to access the information.

```
>>Please enter your next command<<
*DEFINE      OVERVIEW HELP DOCUMENTS AND TUTORIALS - HHM      Year: 08 09
Command: HHM  Account: _____ Misc: _____ Month: AUG
EID: _____ Dept Req: _____ Inventory: _____ Purch Ctr _____
=====
COMMAND      FUNCTION:                                     MISCELLANEOUS
-----
1.  HH1      INTRODUCTION TO *DEFINE
2.  HH2      INTRODUCTION TO ELECTRONIC DOCUMENTS
3.  HH3      TROUBLESHOOTING ERROR MESSAGES
4.  HH4      REQUEST PRINTED REFERENCE MANUAL
5.  HH5      VIEW A LIST OF ALL COMMANDS
6.  HH7      DISPLAY "GOOD MORNING" SCREEN
7.  HH8      ELECTRONIC OFFICE MANAGEMENT
```

Note: If you know the **three-letter command** for the function you want to perform, then type it in the Command field, press Enter and the system will take you there. If you do not know the three-letter command, you can use the menu structure to find your way around the system.

YS1 – Your Desk and View Screen

The YS1 command will display the desk and views you are authorized to use in DEFINE. One person may have several desks that contain different commands. Depending on the command you want to access, it may be necessary for you to change your desk.

In DEFINE, a Desk must be linked to an Administrative View in order to be functional. The linking of the desk and view is set-up by the DEFINE Administrative Services Office with the approval of the Department Head or Account Administrator.

```
*DEFINE      DISPLAY/SELECT PERSONAL AUTHORIZATIONS - YS1      Year: 08 09
Command: YS1  Account: _____ Misc: _____ Month: AUG
=====
Personal Authorization screen for KGJBD , JOHN DOE
CURRENT DESK: AQTEAM      CURRENT ADMINISTRATIVE VIEW: 5140GAT *
Select a Desk and View by Number: ____ Select an Action: _
DESK      ADMIN.VIEW      VIEW DESCRIPTION
1. COEHD/STF1 1500000 ALL ACCOUNTS IN UNIT/SUB 1500000
2. EHD/VP7 1500000 ALL ACCOUNTS IN UNIT/SUB 1500000
3. PUBLIC PUBLIC GENERIC VIEW
```

What is a DESK?

In DEFINE, the Desk is where commands (AMM, GT1, VP2, etc) are assigned. There may be 1 to 10+ people assigned to a desk and they will have the same access in DEFINE. Each Desk will have a unique name that indicates its function. When a new desk is created, the employee's duties are taken under consideration.

For Example: The people who process ProCard charges in the Accounting maybe assigned to a desk called ACCTGPROCARD. So, everyone assigned to the ACCTPROCARD desk can process the ProCard documents.

What is an Administrative View?

The administrative view may contain all of the department accounts (units) or only selected accounts. An administrative view will group department accounts together for processing purposes.

YB2 – Your Document In-BOX

Command YB2 will display all electronic documents that require your approval or review.

You may view another user's Inbox by typing their DEFINE user ID in the Logon ID field and pressing Enter. However, you will NOT be able to select any documents in another person's inbox UNLESS you share the same desk and authorization as the user.

There are 7 different views in the YB2 module. The inbox will automatically default to View 1 of 7. The difference among the views is the information displayed about each document.

>> Electronic documents awaiting review for KGJBD <<
 *DEFINE DOCUMENT IN-BOX: DOCUMENT LISTING - YB2 Year: 08 09
 Command: YB2 Logon ID: KGJBD Misc: _____
 =====
 To review documents: 1. Mark any documents you wish to select and press PF3
 OR 2. Press PF2 to select all documents (maximum 100).
 View 3 of 7

Document ID	Creator	Summary	Created	Status
Y3VJ1995504	KGJBD	STIPEND	08/13/2009	R
Y3VP7996557	KGJBD	Procard payment - Tom Evans	08/19/2009	N
Y3VP2984915	KGJBD	George Hernandez	08/19/2009	C
Y3VP2984833	KGJBD	Doris Harper	08/19/2009	I
Y3VP2984836	KGJBD	Al Smith	08/19/2009	A

Document Status:
 R - Document RETURNED to you as the creator
 N - NOTIFICATION copy for your review
 C - Documents CREATED by you but not yet approved
 I - INFORMATION copy of a document for your review
 A - Document for your APPROVAL

Note: Documents needing Approval will appear in the inbox of each person working on the desk of the document.

YI8 – Your Employee Information System

Purpose

The YI8 screen allows you to view and/or update your personal information.

How to Use

To view or to update the biographical information for any of the sections listed, simply mark the field next to that section with an “X” and **press Enter**. Please note that any changes made on the YI8 screens will be reflected on your employee record ONLY. These changes will NOT be made on any other types of records you may have with the University (student, applicant, etc.).

```

*DEFINE EMPLOYEE INFORMATION SYSTEM - YI8 Year: 08 09
Command: YI8 EID: JD4321 Misc: _____ Month: AUG
=====
Name: Doe, John

Doe, John will be the name used in the Directory.

SECTIONS:
- 1. <--- If you don't know what to do, please mark here.
- 2. Personal Information
- 3. Home Addresses (US Mail, W2 Address)
- 4. Work Addresses (Mail Code, Bldg, E-mail)
- 5. Telephone Numbers (Home and Work)
- 6. Emergency Contacts
- 7. Education
- 8. Teaching Experience/Academic Information
- 9. Veteran Status Information
- 10. History of YI8 Updates

You may update this info on the web at https://utdirect.utexas.edu/pnbiog
To view the UT Privacy Statement go to http://www.utexas.edu/policies/privacy/
    
```

Note: You may also update your personal information on the web by using UT DIRECT, My Jobs Tab, Employee Biographical Information at <https://utdirect.utexas.edu>. It is not necessary to update in both places.

For more instructions regarding the Sample Screens discussed refer to the YMM (Your Personal Module) handout.

Commonly Used Commands

Request for access to any of the commands listed below requires a completed Request for DEFINE Access form. The form should include the commands the user will be authorized to use and the DEFINE Electronic Office Manager's signature. The DEFINE Electronic Office Manager is usually the Department Head or Account Administrator. The completed forms can be faxed to DEFINE Services at ext. 7434 or campus mail to DEFINE Services.

COMMANDS	DESCRIPTION	CONTACT DEPT (Policy & Procedure)	EXT
AMM	Appointment & Personnel Information		
ACA	Change Appointment - Admin/Professional	HR	4259
ACC	Change Appointment - Classified Monthly	HR	4259
ACF	Change Appointment - Faculty	HR	4259
ACH	Change Appointment - Hourly	HR	4259
ACI	Change Appointment - Assistant Instructor	HR	4259
ACS	Change Appointment - Student Academic	HR	4259
ANA	New Appointment - Admin/Professional	HR	4259
ANC	New Appointment - Classified Monthly	HR	4259
ANF	New Appointment - Faculty	HR	4259
ANH	New Appointment - Hourly	HR	4259
ANI	New Appointment - Assistant Instructor	HR	4259
ANS	New Appointment - Student Academic	HR	4259
ARM	Reappointment Electronic Document	HR	4259
BDM	Budget Documents Menu		
BDL	Budget Recommendation Form: Long Session	BUDGET OFFICE	4230
ETM	Employee Time Management		
ET1	Employee Transfers & Balances	HR	6647
ET2	Employee Balances By Department	HR	6647
ET3	Employee Activity and Balances	HR	6647
ETA	Entry of Manual Adjustments	HR	6647
ETB	Employee Time Activity	HR	6647
JMM	HRMS Document Menu		
	100 plus documents established for processing employee positions and assignments (web based)	HR	4259
GBM	Balance Inquiries		
GB1	Account Info (Displays balances for a specific budget group -Type a 10-digit account number)	Accounting Services	4212
GB2	Account Info (Overall view of balances for each budget category - Type a 8-digit budget group number)	Accounting Services	4212
GGM	General Information Inquiries		
GG1	Travel - Maximum Expense Allowances	Travel	4831
GG2	Travel - Distance From Home Campus	Travel	4831
GG3	Vendor Addresses - Name Order	Disbursements	4836
GG4	Vendor Addresses - Number Order	Disbursements	4836
GG5	Unit Codes - Unit Code Order	Accounting	4212
GG8	Object Code - Code Order	Accounting	4212
GG9	Object Code - Keyword Order	Accounting	4212
GGV	Dept Vendor Identification Number Request	Disbursements	4836

GTM	Transactions Inquiries		
GT1	Transactions by Account and Date	Accounting	4212
GT2	Transactions by Voucher Number	Accounting	4212
GT3	Transactions by Encumbrance Number	Accounting	4212
GT6	Transactions by Document ID	Accounting	4212
GT9	Transactions by Vendor ID	Accounting	4212
GTB	Transactions by Check Number	Accounting	4212
NVM	Inventory Module		
NV1	Display By Inventory Number	Inventory	4835
NV3	Display By Unit-Code	Inventory	4835
NV7	Display By Serial-Nbr	Inventory	4835
NVP	Physical Inventory By Unit/Location	Inventory	4835
NVB	Inventory Balances By Unit Code	Inventory	4835
NV6	Display By Doc-Id	Inventory	4835
OVM	Payroll Voucher		
OV1	Hourly Payroll Request	Payroll	4280
OV5	Dept Overtime Pay Request	Payroll	4280
PMM	Purchasing Module		
PBO	Small Purchase Order (web based)	Purchasing	4060
PXO	PBO Change Order (web based)	Purchasing	4060
VMM	Voucher Processing Module		
VE5	Request for Travel Authorization	Travel	4833
VE6	Correction Document for VE5	Travel	4833
VP1	Purchase Order Payment Request	Disbursements	6979
VP2	Service Payment Request	Disbursements	6979
VP5	Travel Payment Voucher	Travel	4833
VP7	Procurement Card Payment Request	Disbursements	6979
VTM	Inter-Departmental Transfer Vouchers		
VT1	Budget Transfer - 14 Accounts (State Funds)	Budget Office	4230
VT2	Budget Transfer - 18, 19, & 29 Accounts	Budget Office	4230
VT5	Inter-Departmental Transfer (IDTs)	Disbursements	4215