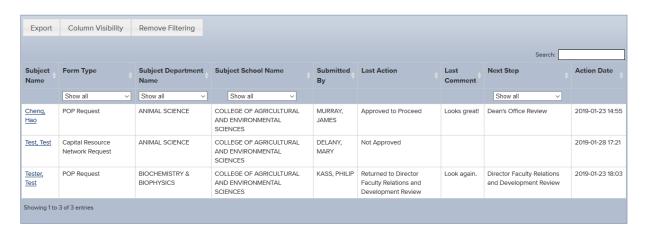# OCP Routing System User Guide

For Dean's Office Analysts

https://ocpweb.ucdavis.edu/routing

Current Requests en Route

- This is the home page, from where you can view all of the current requests en route along with their statuses.
- Here's an example that shows a CAES Dean's Office Analyst logged in and viewing three current requests; two from the POP App and one from CRN:

	Export	Column Visibility	Remove Filtering						

Search:

Subject Name	Form Type	Subject Department Name	Subject School Name	Submitted By	Last Action	Last Comment	Next Step	Action Date
	Show all	Show all	Show all				Show all	
Cheng, Hao	POP Request	ANIMAL SCIENCE	COLLEGE OF AGRICULTURAL AND ENVIRONMENTAL SCIENCES	MURRAY, JAMES	Approved to Proceed	Looks great!	Dean's Office Review	2019-01-23 14:55
Test, Test	Capital Resource Network Request	ANIMAL SCIENCE	COLLEGE OF AGRICULTURAL AND ENVIRONMENTAL SCIENCES	DELANY, MARY	Not Approved			2019-01-28 17:21
Tester, Test	POP Request	BIOCHEMISTRY & BIOPHYSICS	COLLEGE OF AGRICULTURAL AND ENVIRONMENTAL SCIENCES	KASS, PHILIP	Returned to Director Faculty Relations and Development Review	Look again.	Director Faculty Relations and Development Review	2019-01-23 18:03

Showing 1 to 3 of 3 entries

- To view all of the intake information for a request, as well as routing logs and comments, click the linked Subject Name and the request will open within its corresponding system. (Ex. clicking Tester, Test above opens that record in the POP Services Request Application.)

Maintaining Users

As Dean's Analysts you're able to view and maintain all of the users from your School / College

- **User List**
    - o Use this as a quick view of all the users in your School/College
    - o You can filter the list by Department Name and Code. You can also type an employee's first or last name in the "Search" field to quickly find them
    - o Click Edit to view the employee's information
    - o You may reorder the list by clicking the up / down icons next to the column header names
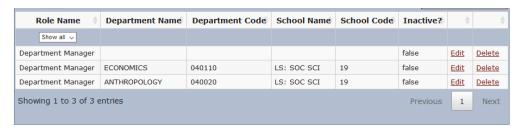
- **Adding a new user**

As a Dean's Analyst, you may add any employees associated with your College / School (determined by Home Department information in PPS) to the Routing System.

- o Click on the "User List" navigation item and then the "Create New User" link
- o To find an employee, slowly type one of the following pieces of information in the "Find / Select Person" field:
    - Last Name
    - First Name
    - Email
    - Kerberos ID
- o Scroll through the list and click on the employee's information
- o To change the Employee's department information, slowly type the department name or code in the "Find / Select Different Department" field
- o Save the employee by clicking "Save User"
    - Once saved you will not be able to change the employee's Name, Kerberos or Email, however, you can change their main department information

- **Adding Roles to a User**

    Users may be assigned to several Roles for several departments. As a Dean's Analyst, you may associate employees to any department from your College / School.

    - o Click on the Roles tab
    - o Select a "Role Name"
    - o As a Dean's Analyst, you can associate the following roles with Users
        - Department Staff
            - Can initiate / Save forms for their department
        - Department Manager
            - Can Initiate / Save and Submit Forms for their department
        - Department Chair
        - Dean's Analyst
            - Can do the following for their College / School:
                - o Initiate / Save
                - o Submit / Approve to Proceed to Associate Dean / Dean

    - o If you wish to associate the user with the department in their User Information then click "Add Record"
    - o If you wish to associate the user with a different department then select the Role and then slowly type the Department Name or Code in "Find / Select Different Department" and select the department then click "Add Record"
    - o Here's an example of someone with three records, set up as Department Manager for their own department and two other departments:

Role Name	Department Name	Department Code	School Name	School Code	Inactive?		
Show all ∨							
Department Manager					false	Edit	Delete
Department Manager	ECONOMICS	040110	LS: SOC SCI	19	false	Edit	Delete
Department Manager	ANTHROPOLOGY	040020	LS: SOC SCI	19	false	Edit	Delete
Showing 1 to 3 of 3 entries					Previous	1	Next

- o You may wish to associate one person in a department role for an entire school. This is accomplished by selecting the role, finding one of the departments within the school and then clearing the department information. Below is the resulting form and record for someone being added as a Department Manager for all of CAES:

Role Name	Department Name	Department Code	School Name	School Code	Inactive?		
Show all ∨							
Department Manager			AGRICULTURE	01	false	Edit	Delete
Showing 1 to 1 of 1 entries					Previous	1	Nex

Edit User Roles

Fields with a red asterisk (*) are required.

User Roles

Find / Select Different Department: [   ]

* Role Name: [Department Manager   ∨]

Department Name:

Department Code:

School Name: AGRICULTURE

School Code: 01

Inactive?:   ○ Yes   ◉ No

Clear School