

What's New in FY '06 Rollover?

Galaxy 2000

Line Item Approvals

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FY '06 Line Item Approvals

Overview

In Fiscal Year 2006 transactions entered by schools will require additional information to be entered. These additional entries are designed to improve the accuracy of the transactions and will therefore assist the ROCs in verifying transactions for approvals.

Transactions that require additional information when being saved by the school that are not fully completed will require an **override authorization** by the ROC at the time of approval. Transactions affected are:

1. Hold Harmless Requests for inter/intra district transfers where there is no vacancy at the new location.
2. Vacancies for employees changing titles in the same school.
3. Hold Harmless Requests for Pending Retirement when the employee is not on the pending retirement file.
4. Budget items scheduled by schools for IEP Paras that do not include an OSIS number or where that OSIS number is not unique.

Not all of the transactions will require override authorization by the ROC on the Line Item Approval Screen. For example, an inter-district transfer may be entered by a school user for an employee who is listed as the intended SSN on a vacancy in another school – in this case all the additional information was completed by the school and the override authorization is not required by the ROC when entering the approval.

Additionally, certain transactions will require authorization from DHR prior to approval from the ROC. DHR authorization will be entered on a separate screen from LIA. **Figure 1** below details the alert for the ROC when a DHR authorization is required and if that authorization has been granted. Transactions requiring DHR approval do not need override authorization from the ROC, but will need to be approved by the ROC. The transactions requiring DHR authorization are:

1. Hold Harmless Requests for Pending Reassignment, when the employee is not on the pending reassignment file.
2. Hold Harmless Involuntary Excess Requests where the employee is not the least senior.

Items requiring **Override Authorization** can be disapproved if the authorization is not to be given. Disapproved items will also remove the item from the DHR Approval screen. Note that once the override authorization is granted the item must be approved using either the select item or select all features. This approval step is necessary in order to check fund control and update RMS and

EIS.

Please Note: DHR also has the ability to disapprove items. Items disapproved by DHR will be deleted after they are acknowledged when opening the TO. ROC users do not have to authorize the disapproval.

Please Note: When using the **select all** feature of Line Item Approvals, items requiring either DHR Authorization or ROC Override Authorization will be excluded (see **Figure 5** below.)

What's new for the LIA window?

Line Item Approval window enhancements

For FY '06 the enhanced LIA has two new columns: **Awaiting Action** and **Message**. These new columns will appear on the Non-Approved, Approved and Hold Harmless tabs.

Awaiting Action

The Awaiting Action column will have a check mark if an item requires action by a ROC or DHR user. Transactions that require **override authorization** by the ROC have the **Awaiting Action** column highlighted in yellow. Actions requiring DHR approval are highlighted in orange. If an action requires both DHR and ROC approval it will appear as yellow on the LIA screen until it is acted upon by the ROC. The check mark will be bold when the item requires action. (see **Figure 1** below.)

Message

The **Message** column is highlighted when a transaction was saved by a school user using a fund control exception. Fund control exceptions, other than a person changing titles in the same school, do not require override authorization.

This situation is pointed out to ROC approvers in order that they have an indication that fund control exceptions are being invoked, thereby prompting the approver to review appropriately.

The **Message** column will be marked when there is a message regarding the item. The mark will be bold when there is a message. (See **Figure 5** below.)

Galaxy 2000 - [Line Item Approval Screen]

File Galaxy Function Tables Tools Session Window Help

Cost Factors Allocations Budget Approvals Status Session Help Exit

Venugopal Koli 01M034-PS 034 FRANKLIN D ROOSEV

District: 02 - Community School Dist T School: 02M002

Non-Approved Items (1) Approved Items (0) System Generated Mods (0) Hold Harmless (1)

AC	FS	TO	Awaiting Action	Message	Select	School	Item No	Person Name	Title / Object Code	Removal Date	Reason	Submission Date	Old AC	Old Amount	New AC	New Amt	Status
			<input checked="" type="checkbox"/>		<input type="checkbox"/>	02M002	629	HUI, LINDA	TEACHER - REGULAR GRADES / (005)	10/30/2004	Pending Inter-District Transfer	May 4 2005 11:18AM, Venugopal Koli		\$45,364.96		\$45,363.84	Submitted (In Process)

Awaiting Action Column

Show Status:
 Submitted By School
 Submitted By District
 Posted (Final Approval)
 Rejected By Batch

Funding:
 Show Funded Items
 Show Non-Funded Items

View PTF

Submitted (In Process)	\$45,363.84
Submitted by District	\$0.00
Posted (Final Approval)	\$0.00
Total	\$45,363.84

Fund Control Financial Analysis AC Related Changes Dis-Approve Approve Recall Reject Remove HH Print Close

Status Information Fiscal Year 2005 - Regular Period (Administrator-A) Running Connected - FIELDTEST NUM CAPS INS 5/4/2005

Figure 1

What types of actions will require ROC Authorization?

ROC Authorization

Only the following actions will generate the additional approval step:

1. Hold Harmless Requests for inter/intra district transfers where there is no vacancy at the new location.
2. Vacancies for employees changing titles in the same school.
3. Hold Harmless Requests for Pending Retirement when the employee is not on the pending retirement file.
4. Budget items scheduled by schools for IEP Paras that do not include an OSIS number or where that OSIS number is not unique.

Please Note: The **Awaiting Action** column on the LIA window will have a check mark on the line item when an action is required. Items requiring action by ROC will have a yellow background with a check mark.

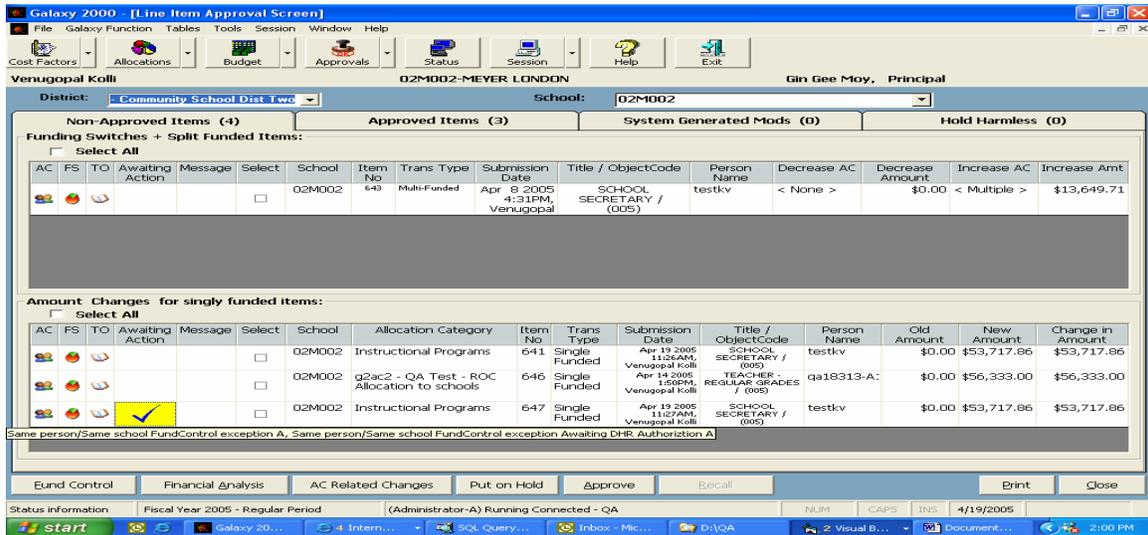


Figure 2

Please Note: Users will be able to save these items, but they have to have ROC override authorization prior to final approval.

How do I view the Awaiting Action and Message column(s) on the LIA screen?

Viewing the Awaiting Action and Message column(s)

To View the Awaiting Action and Message column(s):

1. Select the district and school you want to view.
2. Click the **Approvals** option from the main menu.
3. Click on the Non-Approved, Approved or Hold Harmless tab.
4. If necessary, scroll down to see the line item that requires additional approval.

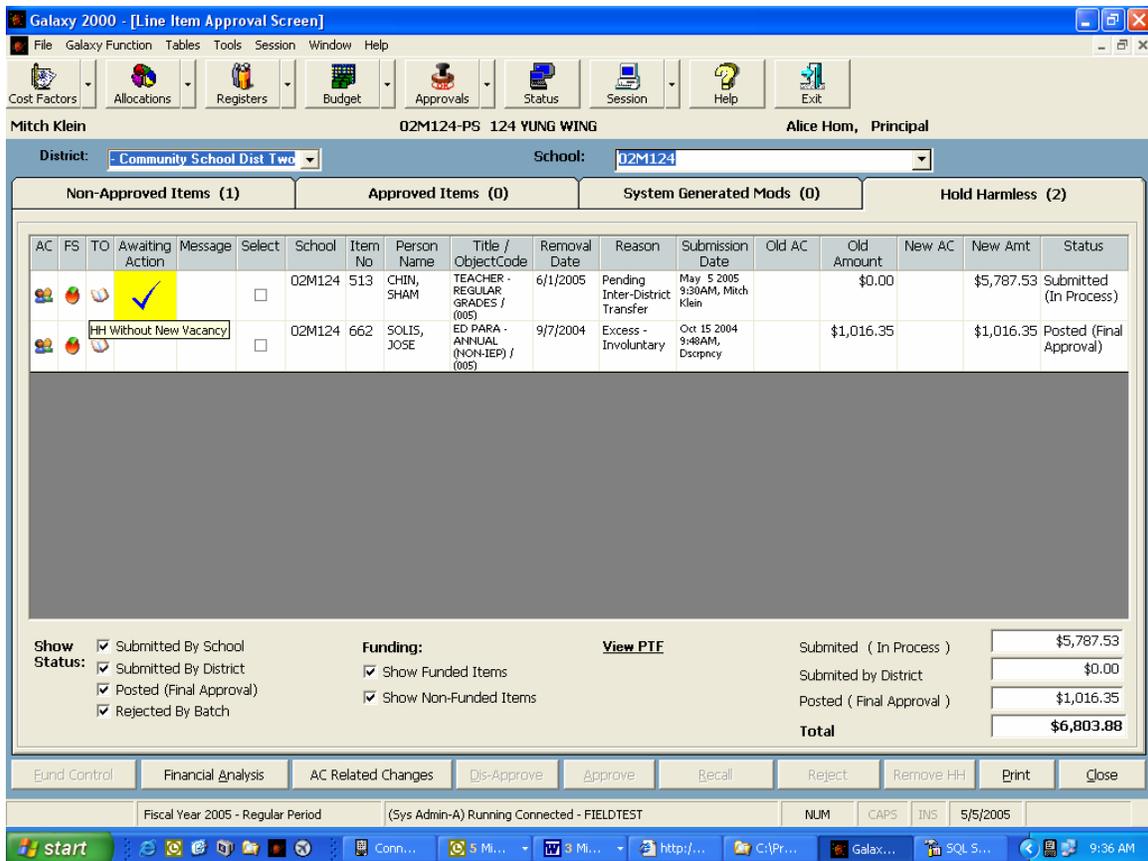


Figure 3

How do I Authorize an Awaiting Action Item?

Authorizing an Awaiting Action item

To Authorize or view an Awaiting Action:

1. Hover the mouse over the **Check** mark to read the action(s) required and/or taken.
2. Click on the check mark to open the **Additional Authorization** window.
3. The **Additional Authorization** window will have the following information displayed: Exception Message, User, Date, and Authorization reason.

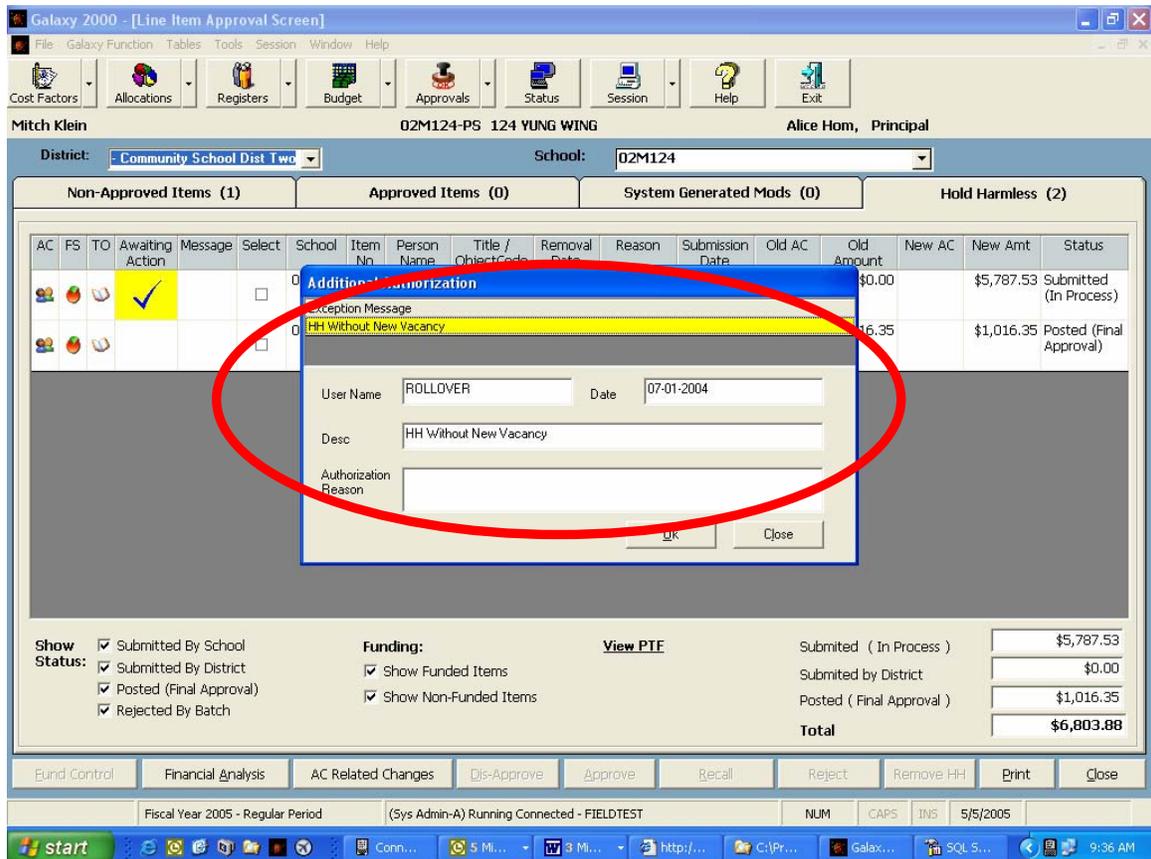


Figure 4

4. To authorize the action on the **Additional Authorization** window, type the Authorization reason and click OK. The window will automatically close

and return you to the LIA window.

5. The check mark in the Awaiting Action column will now have a Lock next to it.
6. Select the approval check box under the **Select** column and approve the line item.

How does the Select All feature affect LIA?

Select All feature

When using the **select all** feature of Line Item Approvals, items with outstanding DHR Authorization or ROC Override Authorization will be excluded. (See **Figure 5** below.)

The screenshot shows the Galaxy 2000 interface for Line Item Approvals. The user is logged in as Venugopal Koli for District 01 and School 01M034. The interface displays a table of funding items with columns for AC, FS, TO, Awaiting Action, Message, Select, School, Item No, Trans Type, Submission Date, Title / ObjectCode, Person Name, Decrease AC, Decrease Amount, Increase AC, and Increase Amt.

AC	FS	TO	Awaiting Action	Message	Select	School	Item No	Trans Type	Submission Date	Title / ObjectCode	Person Name	Decrease AC	Decrease Amount	Increase AC	Increase Amt
					<input type="checkbox"/>	01M034	617	Decrease Budget amount	May 4 2005 11:16AM Venugopal Koli	TEACHER - REGULAR GRADES / (005)	CORNELIO, SOTCHIE	< Multiple >	\$37,433.91	< None >	\$0.00

Amount Changes for singly funded items:

AC	FS	TO	Awaiting Action	Message	Select	School	Allocation Category	Item No	Trans Type	Submission Date	Title / ObjectCode	Person Name	Old Amount	New Amount	Change in Amount
					<input checked="" type="checkbox"/>	01M034	Early Grade Class Size Reduction	506	Decrease Budget amount	May 4 2005 11:14AM Venugopal Koli	TEACHER - REGULAR GRADES / (005)	BUDNICK, JILL	\$77,277.95	\$63,250.46	-\$14,027.49
					<input checked="" type="checkbox"/>	01M034	TL Special Needs	527	Decrease Budget amount	May 4 2005 11:09AM Venugopal Koli	TEACHER - REGULAR GRADES / (005)	KNIGHT, CARA	\$55,873.00	\$45,730.93	-\$10,142.07
			<input checked="" type="checkbox"/>		<input type="checkbox"/>	01M034	Instructional Programs	647	Single Funded	Apr 29 2005 6:05PM Jo Ann Cleghome	TEACHER - REGULAR GRADES / (005)	CORNELIO, SOTCHIE	\$0.00	\$55,873.00	\$55,873.00

Figure 5

What types of Messages will be shown?

Messages for Information only:

- Fund control exception due to Title
- Other messages may be added at a later date if additional fund control exceptions are granted.

These items will be marked in the LIA screen with a colored check mark in the **Message** column.

No action is needed when the **Message** box is highlighted.

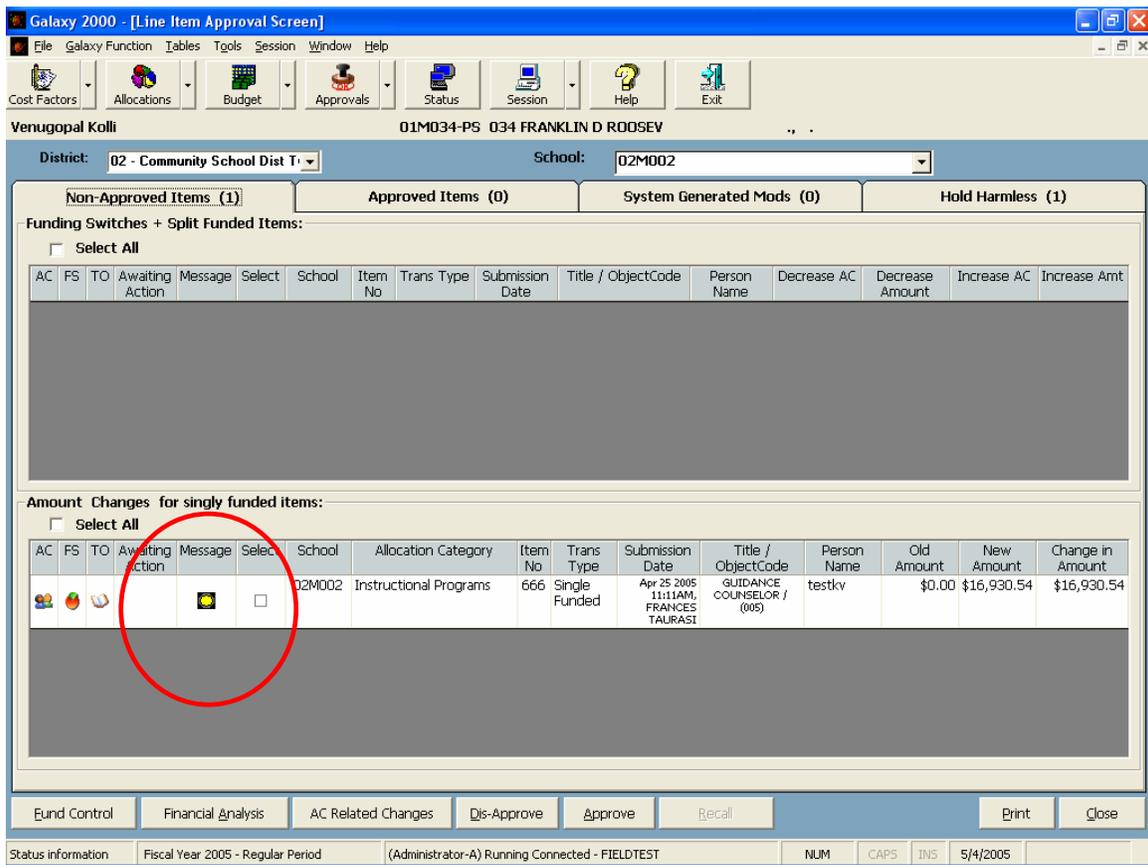


Figure 6