

Chapter 6 Site Maintenance and Lock Sites Windows

Overview

Use the Site Maintenance window to add, duplicate, modify, and delete sites and site information, to include document serial number ranges, OPTAR (operating targets) assignments, authorizations, and job order numbers (JONs) associated with the selected site. You also can use the window to lock or unlock selected sites and view a site's assigned document types and users. Use the Lock Sites window to lock one or more of your sites for end-of-month reconciliation between FASTDATA and STARS-FL. Access to the Site Maintenance window is defined on the FA User Maintenance window; users can have **No Access**, **Update**, or **Display-Only** access to this window. To add, duplicate, modify, and delete sites, users must have FA User Maintenance window **Sites Update** access. To lock a site, at least one user at the site must have a **Locked Site Access** value of **Update** or **Display-Only** and an **Import, Export Data** value of **Access** assigned, as specified on the Site User Maintenance window.

The first section of the chapter discusses the Site Maintenance window while the second section explains the Lock Sites window.

The six tabs on the Site Maintenance window provide users with quick access to data associated with the selected site. Using these tabs, users can view assigned OPTARs, serial ranges, authorizations, JONs, document types, and users for the selected site. Because the Site Maintenance window tabs provide many options for adding and deleting data associated with sites, this chapter is divided into several sections. The first section addresses site data options, while the remaining sections address the options available from the Site Maintenance window tabs. For more information on a specific tab, refer to the appropriate section within this chapter.

Many of the options available from the Site Maintenance window, such as adding sites and viewing OPTAR details, also are available from the FA Maintenance window. In this chapter and in Chapter 5, which discusses the FA Maintenance window, the manual lists the options available from both windows. So as not to repeat the detailed steps in both chapters for each option available from more than one window, the User's Manual will refer you to the chapter in which you can find the detailed steps.

To open the Site Maintenance window, select **Sites** from the **Process** menu or select the **Sites** toolbar button.

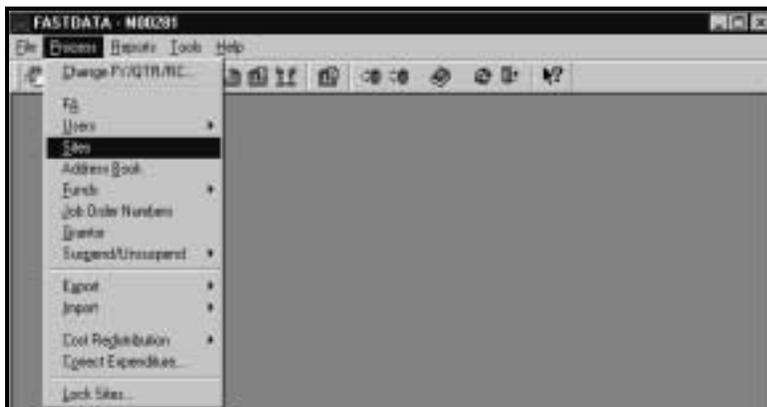


Figure 6.1
Opening the Site Maintenance Window

The Site Maintenance window will open.

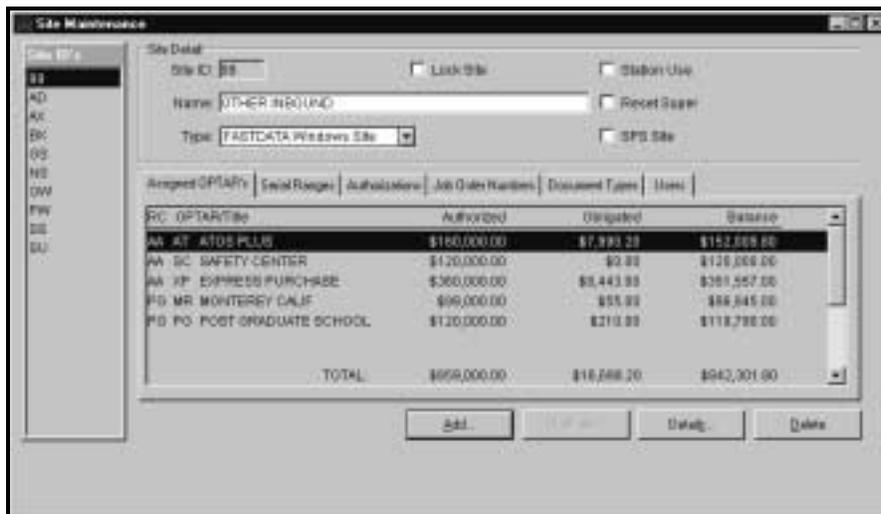


Figure 6.2
Site Maintenance Window

Restrictions

- Only users with an FA User Maintenance window **Sites Update** access level can add, update, and delete site data and lock sites on the Site Maintenance window.
- An FA User Maintenance window **Sites** access level of **Display-Only** limits users to view-only access to the Site Maintenance window.
- An FA User Maintenance window **Sites** access level of **No Access** prevents a user from accessing the Site Maintenance window.

• Site Maintenance Window Objects

Site ID's

Lists the sites established for the current FA.

Site ID

The two-character identifier of the selected site.

Lock Site

Controls whether the selected site is locked or not. When checked, this check box indicates the site is locked.

Station Use

Indicates whether the site's MILSTRIP transactions are recorded in STARS-FL through an interface with Uniform Automated Data Processing System (UADPS) station use tape. When checked, this check box indicates the interface is through UADPS station use tape. When modifying site information, you can modify the **Station Use** check box.

Name

The descriptive name of the selected site. When modifying a site, you can modify the **Name**.

Reset Super

Indicates whether the password for the site's OnNet user ID will be reset on the next export. This check box is used to reset the site OnNet password if site personnel have forgotten the password. When checked, this check box indicates the password will be reset on the next export. When modifying site information, you can modify the **Reset Super** check box.

Type

Indicates the type of external interface the site uses. Valid values include **ATOSPlus**, **1.4a Clipper**, **Order Writer**, **FASTDATA DOS Site**, and **FASTDATA Windows Site**. When modifying site information, you can modify the **Type**.

SPS Site

Indicates whether the selected site interfaces with the Standard Procurement System (SPS) that supports DOD paperless acquisition initiatives.

Assigned OPTAR's Tab

Lists the assigned OPTARs for the selected site.

Serial Ranges Tab

Lists the serial ranges for the selected site.

Authorizations Tab

Displays information about authorizations associated with the selected site.

Job Order Numbers Tab

Displays information on the JONs associated with the selected site.

Document Types Tab

Displays the document types assigned to the selected site.

Users Tab

Lists the user IDs and database user IDs of all users assigned to the selected site.

 **Site Maintenance Window Options**

- **Add a new site**
- **Duplicate an existing site**
- **Modify a site**
- **Delete a site**

■ Steps for Adding a New Site

1. With the Site Maintenance window open, select the **File** menu **New** item or select the toolbar **New** button. The New Site window will open.

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- To add a new site from the FA Maintenance window, select the desired FA ID from the **FA ID's** list box, select the **Sites** tab, and then select the **Add** button. Refer to Chapter 5.
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Figure 6.3
New Site
Window

2. Enter the required two-character **Site ID**.
3. Enter the required descriptive **Name** of the new site. The name can contain up to 25 characters.
4. Select the desired site type from the **Type** drop-down list. Valid values include **ATOSPlus**, **1.4a Clipper**, **Order Writer**, **FASTDATA DOS Site**, and **FASTDATA Windows Site**. The default value is **FASTDATA Windows Site**.
5. Check the **Station Use** check box if you wish to indicate the site's MILSTRIP transactions are recorded in the target accounting system through an interface with UADPS station use tape. The default for the check box is unchecked.
6. Check the **Reset Super** check box if you want the password for the site's OnNet user ID to be reset on the next export.
7. Check the **SPS Site** check box if the new site will interface with SPS.
8. Select the **Change FY** button if you wish to add the new site under a different fiscal year. The Change FY/QTR/RC window will open, allowing you to select a different fiscal year under which to add the new site.
9. Select the **Save** button to save your changes. FASTDATA will inform you that the site was successfully saved. If you have more sites to add, continue entering new site information and saving it.
10. When you have entered all desired new sites, select the **Close** button to close the New Site window.
11. If you wish to lock the new site(s), select the desired site and check the **Lock Site** check box on the Site Maintenance window, then select the **Save** toolbar button.

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- For information on locking multiple sites simultaneously, refer to the section on locking/unlocking sites, beginning on page 6.30.
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■ Steps for Duplicating an Existing Site

From the Site Maintenance window, authorized users can duplicate an existing site and save it as a new site that will contain much of the same information as the existing site.

1. Select the site you wish to duplicate from the **Site ID's** list box.
2. Select the **File** menu **Duplicate** item or select the **Duplicate** button from the toolbar.

The New Site window will open, displaying the existing site information with an empty **Site ID**.

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- To duplicate a site from the FA Maintenance window, select the desired FA ID from the **FA ID's** list box, select the **Sites** tab, select the site you wish to duplicate, and then select the **Duplicate** button. Refer to Chapter 5.
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3. Enter the new **Site ID** and modify any other desired information.
4. Select the **Save** button. FASTDATA will inform you that the site was successfully saved.
5. Select the **Close** button to close the New Site window. The new site will display on the Site Maintenance window **Site ID's** list box.
6. If you wish to lock the new site, check the **Lock Site** check box on the Site Maintenance window, then select the **Save** toolbar button.

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- For information on locking multiple sites simultaneously, refer to the section on locking/unlocking sites, beginning on page 6.30.
-

■ Steps for Modifying a Site

1. Select the site you wish to modify from the **Site ID's** list box.
2. Modify the desired information. You can change the Site **Name** and **Type** and **Lock Site**, **Station Use**, and the **Reset Super** check boxes.



Figure 6.4
Modifying
a Site

3. Select the **Save** toolbar button to save your changes.

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- For information on locking/unlocking multiple sites simultaneously, refer to the section on locking/unlocking sites, beginning on page 6.30.
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■ Steps for Deleting a Site

You cannot delete sites if they have assigned OPTARs or serial ranges; nor can you delete sites that have been exported.

1. Select the site you wish to delete from the **Site ID's** list box.
2. Select **Delete** from the **File** menu or select the toolbar **Delete** button. FASTDATA will prompt you to confirm the deletion.

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- To delete a site from the FA Maintenance window, select the desired FA ID from the **FA ID's** list box, select the **Sites** tab, select the site you wish to delete, then select the **Delete** button. Refer to Chapter 5.
-



Figure 6.5
Deleting a Site

3. Select the **Yes** button to confirm the site deletion. FASTDATA deletes the Site ID from the Site Maintenance window **Site ID's** list box.

• Site Maintenance Window Assigned OPTAR's Tab Objects

When you open the Site Maintenance window, the **Assigned OPTAR's** tab is selected by default. This tab allows you to view the selected site's assigned OPTARs, assign a new OPTAR to the site, view OPTAR details, or delete OPTARs assigned to the selected site. Add a new assigned OPTAR by selecting the **Add** button. To view assigned OPTAR details, select the **Details** button. To delete an assigned OPTAR, select the **Delete** button.

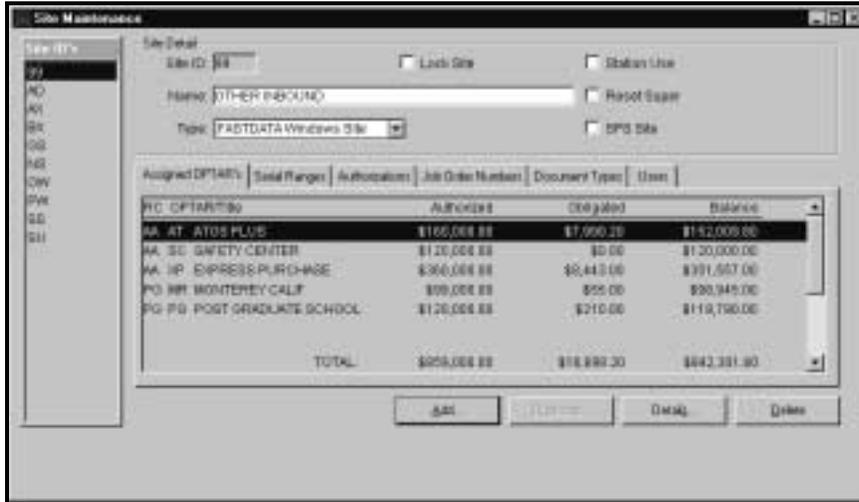


Figure 6.6
Site Maintenance
Assigned OPTAR's
Tab

RC OPTAR/Title

Lists the responsibility centers (RCs), OPTAR IDs, and OPTAR titles of the OPTARs assigned to the site.

Authorized

The amount authorized for the listed OPTAR.

Obligated

The amount obligated for the listed OPTAR.

Balance

The listed OPTAR's authorized amount less the obligated amount.

Add

Opens the Unassigned OPTAR's window, allowing you to assign an OPTAR to the site. This button is unavailable to users whose access on the FA User Maintenance window **Sites** setting is **Display-Only**.

Duplicate

This button is unavailable for selection on the **Assigned OPTAR's** tab.

Details

Opens the Details for OPTAR window, providing more information about the authorizations associated with the selected OPTAR assigned to the currently selected site. This button is unavailable for users whose FA User Maintenance window **Sites** access setting is **No Access**.

Delete

Removes the association between the OPTAR and the site. You cannot delete the association if either the site or the OPTAR has been exported or if there are serial ranges associated with the OPTAR. This button is unavailable to users whose access on the FA User Maintenance window **Sites** setting is **Display-Only**.

R Site Maintenance Window Assigned OPTAR's Tab Options

- Add a new OPTAR assignment
- View and print assigned OPTAR details
- Delete an assigned OPTAR

Restrictions

- Only users with an FA User Maintenance window **Sites Update** access level can add and delete OPTAR assignments on the Site Maintenance window **Assigned OPTAR's** tab.
- An FA User Maintenance window **Sites** access level of **Display-Only** limits users to view-only access to the Site Maintenance window **Assigned OPTAR's** tab.
- An FA User Maintenance window **Sites** access level of **No Access** prevents a user from accessing the Site Maintenance window.

■ Steps for Adding a New OPTAR Assignment

1. From the **Site ID's** list, select the site for which you wish to associate an OPTAR.
2. On the **Assigned OPTAR's** tab, select the **Add** button. FASTDATA will inform you if there are no unassigned OPTARs for the selected site.

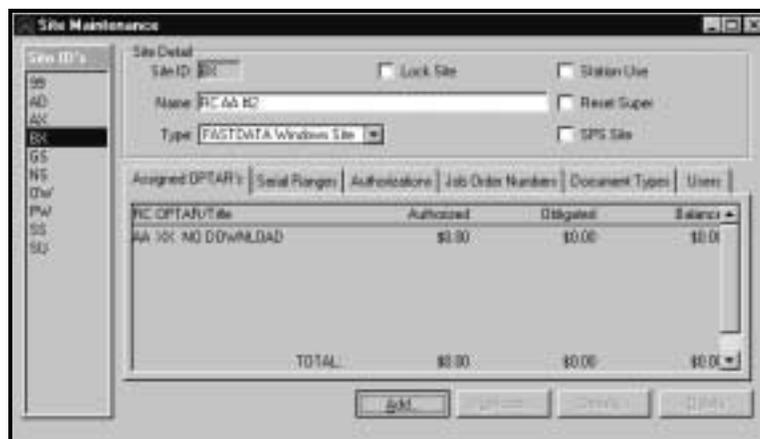


Figure 6.7
Adding a
New OPTAR
Assignment

The Unassigned OPTAR's window will open if there are unassigned OPTARs.

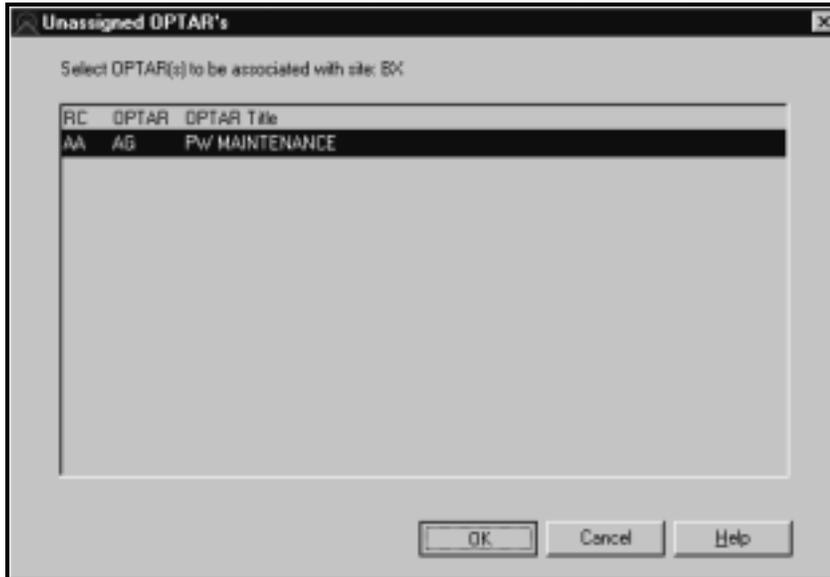


Figure 6.8
Unassigned
OPTAR's
Window

3. Select the desired OPTAR from the list.
4. Select the **OK** button.

The Unassigned OPTAR's window will close and the OPTAR will be assigned to the selected site.

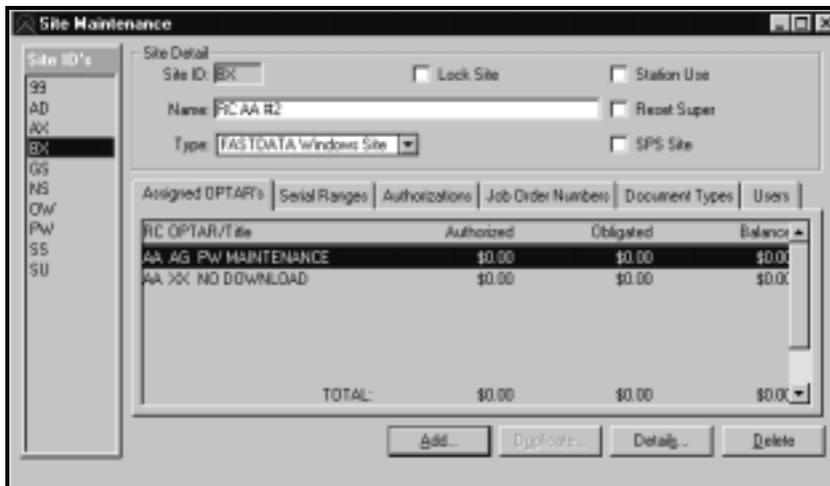


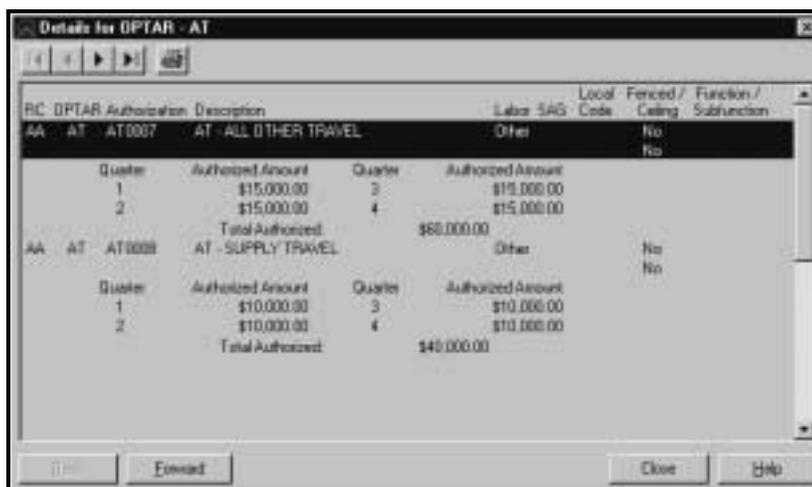
Figure 6.9
New OPTAR
Assignment

The data from the newly assigned OPTAR displays on the **Assigned OPTAR's** tab.

■ Steps for Viewing and Printing Assigned OPTAR Details

1. On the Site Maintenance window **Site ID's** list box, select the site for which you wish to view and print OPTAR details.
2. On the **Assigned OPTAR's** tab, select the desired OPTAR and select the **Details** button.

The Details for OPTAR window also opens from the FA Maintenance window when you select the **Details** button on the **OPTAR's** tab. Refer to Chapter 5.



RC	DPTAR	Authorization	Description	Local	Forced /	Function /
AA	AT	AT0007	AT - ALL OTHER TRAVEL	Other	Costing	Subfunction
	Quarter	Authorized Amount	Quarter	Authorized Amount		
	1	\$15,000.00	3	\$15,000.00		
	2	\$15,000.00	4	\$15,000.00		
		Total Authorized		\$60,000.00		
AA	AT	AT0008	AT - SUPPLY TRAVEL	Other	No	No
	Quarter	Authorized Amount	Quarter	Authorized Amount		
	1	\$10,000.00	3	\$10,000.00		
	2	\$10,000.00	4	\$10,000.00		
		Total Authorized		\$40,000.00		

Figure 6.10
Viewing
Assigned
OPTAR
Details

The Details for OPTAR window will open, displaying information about the authorizations associated with the selected OPTAR.

NOTE The Details for OPTAR window also opens when you select the **Forward** button on the Details for Site or Details for Responsibility Center window or the **Back** button on the Details for Authorizations window. The Details for Site and Details for Responsibility windows open from the FA Maintenance window; they are not available from the Site Maintenance window.



Figure 6.11
Details for
OPTAR
Window

Tip If the **Forward** button on the Details for OPTAR window is available for selection, you can select it to view and print authorization details. Select the Details for Authorization window **Back** button to return to the Details for OPTAR window.

For each of the OPTAR's authorizations, the window displays the authorization's description, a breakdown of the authorized amounts through the current quarter, and whether it is a labor or non-labor authorization. For each authorization, you also can find the authorization's Subactivity Group (SAG) code and Local Code, and whether the authorization has fences or ceilings, and the Function and Subfunction codes for the authorization.

3. Select the **Print toolbar** button to open the Quick Print - Details for OPTAR window.

The Quick Print window allows you to preview the Authorization Detail Report before actually printing it, save the contents of the report as a file, and print the report.



Figure 6.12
Quick Print -
Details for
OPTAR
Window

4. Use the scrollbars and toolbar buttons to modify the view of the report.

Use the scrollbars to move through the report horizontally and vertically. Use the **VCR** buttons to access the first, previous, next and last pages of the report. Use the **Zoom** toolbar button to increase or decrease the magnification percentage of the displayed report to make it easier to read, or to reduce the display so that you can view an entire page. If you wish to see vertical and horizontal rulers on the report window, select the **Rulers** toolbar button.

5. Select the **Save As** toolbar button if you wish to save the report data in a file.
6. Select the desired page orientation, **Landscape** or **Portrait**.
7. Select the **Margin Offset** toolbar button if you wish to increase the left or top margin, depending on the selected page orientation. The wider margin allows for the punching of holes on the printed report.
8. Select the **Print** toolbar button if you wish to print the displayed Details report.
9. Select the **Close** button to close the Quick Print window and return to the Details for OPTAR window.
10. Select the **Close** button to close the Details for OPTAR window.

■ Steps for Deleting an Assigned OPTAR

You cannot delete an OPTAR association if either the site or the OPTAR has been exported or if there are serial ranges associated with the OPTAR.

1. Select the site for which you wish to delete an assigned OPTAR from the **Site ID's** list box.
2. Select the OPTAR you wish to delete from the **Assigned OPTAR's** tab list.
3. Select the **Delete** button. FASTDATA will prompt you to confirm the deletion.

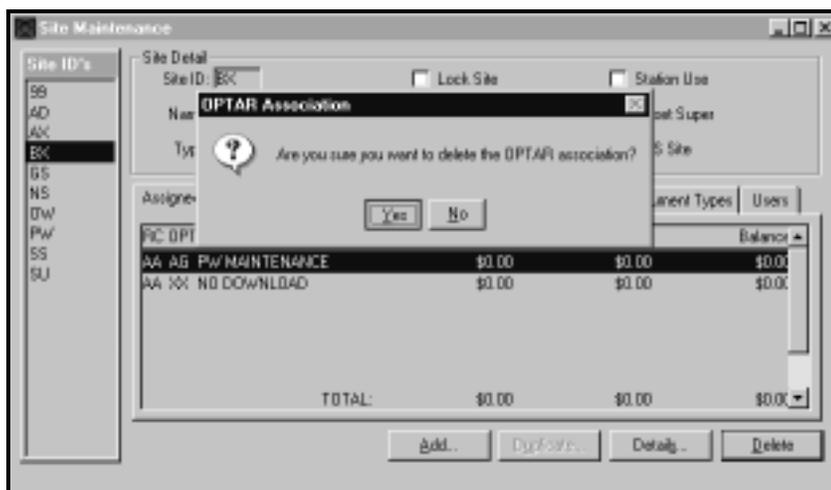


Figure 6.13
Deleting
an Assigned
OPTAR

4. Select the **Yes** button to confirm the deletion. FASTDATA deletes the OPTAR assignment for the selected site.

• Site Maintenance Window Serial Ranges Tab Objects

The **Serial Ranges** tab lists the serial ranges for the currently selected site. Access to serial range data is defined on the FA User Maintenance window. This tab is unavailable if the user's access on the FA User Maintenance window **Sites** setting is **No Access**.

To maintain serial range data on the Site Maintenance window, you must first select the **Serial Ranges** tab. To add a new serial range, select the **Add** button. To duplicate an existing serial range, select the **Duplicate** button. To modify a serial range, select the desired serial range, then select the **Modify** button. To delete a serial range, select the **Delete** button. Refer to the Site Maintenance Serial Ranges Tab help topic for information on the criteria a serial range has to meet before it can be deleted.

You can also duplicate, modify, and delete a serial range from the FA Maintenance window **Serial Ranges** tab. The steps for duplicating, modifying, and deleting a serial range are the same from both the FA Maintenance and Site Maintenance windows.

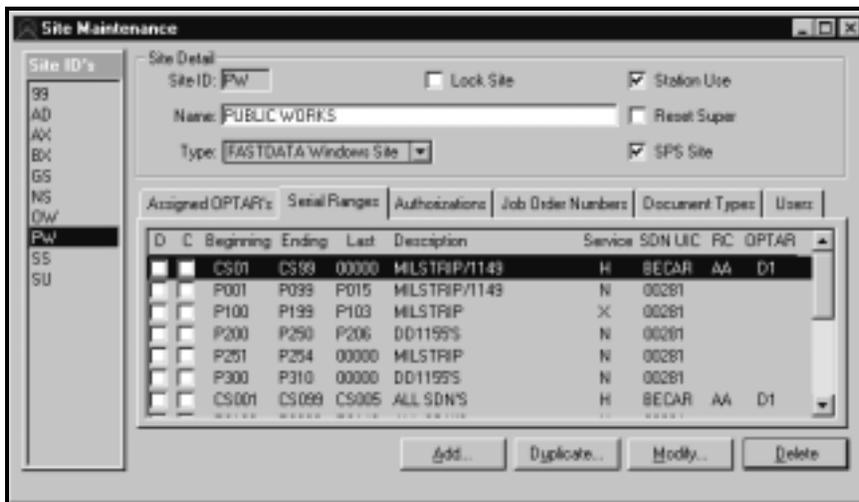


Figure 6.14
Site Maintenance
Serial Ranges Tab

D

Indicates the serial range has been deactivated.

C

Indicates confirmation that the site has acknowledged the serial range's deactivation.

Beginning

Contains the alphanumeric beginning number for the document number serial range.

Ending

Contains the alphanumeric ending number for the document number serial range.

Last

The last number used in the serial range.

Description

Briefly describes the serial range.

Service

Identifies the government department or activity within the Navy as a fleet or shore establishment.

SDN UIC

Lists the Standard Document Number Unit Identification Code assigned to the document serial range for system generation of specific documents.

OPTAR

Lists the OPTAR associated with the serial number range.

Add

Opens the Serial Range window, allowing you to add a new serial range for the site.

Duplicate

Opens the Serial Range window, allowing you to add a new serial range under the selected FA that will contain much of the same information as an existing serial range. This button is unavailable to users whose access on the FA User Maintenance window **Sites** setting is **Display-Only**.

NOTE Depending on your access rights defined on the FA User Maintenance window, the **Serial Ranges** tab will contain either a **Modify** or **Display** button.

Modify

Opens the Serial Range window, allowing you to modify the selected serial range.

Display

Opens the Serial Range window, allowing you to view information on the selected serial range. This button appears on the **Serial Ranges** tab for users whose access on the FA User Maintenance window **Sites** setting is **Display-Only**.

Delete

Removes the selected serial range for the site. This button is unavailable to users whose access on the FA User Maintenance window **Sites** setting is **Display-Only**.

Site Maintenance Window Serial Ranges Tab Options

- **Add a new serial range**
- **Duplicate an existing serial range**
- **Modify a serial range**
- **Delete a serial range**

Restrictions

- Only users with an FA User Maintenance window **Sites Update** access level can add, duplicate, modify, and delete serial range data on the Site Maintenance window **Serial Ranges** tab.
- An FA User Maintenance window **Sites** access level of **Display-Only** limits users to view-only access to the Site Maintenance window **Serial Ranges** tab.
- An FA User Maintenance window **Sites** access level of **No Access** prevents a user from accessing the Site Maintenance window.

■ Steps for Adding a New Serial Range

If you are adding a new serial range to reassign unused numbers in a deactivated, acknowledged serial range make sure you first modify the ending serial range number of the deactivated serial range to the last number used plus 1. Also, the new serial range beginning number should be the modified ending number of the deactivated serial range plus 1. For more details on serial range rules and reusing deactivated serial ranges, refer to the FASTDATA FA Help Serial Range topic.

1. On the Site Maintenance window, select the site from the **Site ID's** list box for which you wish to add a serial range.
2. On the **Serial Ranges** tab, select the **Add** button.



To add a new serial range from the FA Maintenance window, select the **Serial Ranges** tab, then select the **Add** button. See Chapter 5 for details.

The Serial Range window will open.

Figure 6.15
Adding a New
Serial Range

3. Enter the optional serial range **Description** of up to 25 characters.
4. Enter the required **Beginning Serial** number. Serial range numbers have four or five characters, depending on the document type for which you are adding the serial range. The beginning serial and ending serial numbers must be the same length. You can enter letters in the first three positions, excluding the letters **I** and **O**.
5. Enter the required four- or five-character **Ending Serial** number. For **Clipper 1.4a** sites, any letters you enter for the first three characters must match the letters you entered for the beginning serial number. The ending serial value must be greater than the value of the beginning serial number.
6. Enter the required five-character Standard Document Number Unit Identification Code in the **SDN UIC** field.
7. Select an OPTAR code from the **OPTAR** drop-down list, if you wish to associate the serial range with an OPTAR.
8. Modify the default value for the **Service Code** if you wish. This one-letter code identifies the government department or activity within the Navy as a fleet or shore establishment. The default value is **N**.
9. Check at least one **Document Type** check box to indicate the document type(s) that will use the serial range.
10. If you wish to add the new serial range under a different RC, select the **Change RC** button. The Change FY/QTR/RC window will open, allowing you to modify the desired value. Select **OK** to close the Change FY/QTR/RC window.
11. Select the **Save** button to save the new serial range. FASTDATA will inform you that the serial range was successfully saved.

If you have more serial ranges to add, continue entering new serial range information and saving it.

12. When you have entered all desired new serial ranges, select the **Close** button to close the Serial Range window. The new data will display on the **Serial Ranges** tab.



Figure 6.16
Saved Serial
Range Data

■ Steps for Duplicating an Existing Serial Range

From the Site Maintenance window **Serial Ranges** tab, authorized users can duplicate an existing serial range and save it as a new serial range that will contain much of the same information as the existing serial range. When duplicating a serial range, the duplicated serial range cannot overlap an existing serial range within the same SDN UIC. In a "super" FA environment, where multiple FA's share the same database, if you create a new serial range that overlaps an existing range, FASTDATA will ask you to confirm that you actually want to create an overlapping range.

If you are duplicating a serial range to reassign the unused numbers in a deactivated, acknowledged serial range make sure you first modify the ending serial range number of the deactivated serial range to the last number used plus 1. Also, the new serial range beginning number should be the modified ending number of the deactivated serial range plus 1. For more details on serial range rules and reusing deactivated serial ranges, refer to Deactivating, Deleting, and Reusing Serial Ranges FA help topic.

1. From the Site Maintenance window **Site ID's** list, select the site for which you wish to duplicate an existing serial range.
2. On the Site Maintenance window **Serial Ranges** tab, select the serial range you wish to duplicate.
3. Select the **Duplicate** button.

To duplicate a serial range from the FA Maintenance window, select the **Serial Ranges** tab, select the serial range you wish to duplicate, then select the **Duplicate** button. Refer to Chapter 5.

The Serial Range window will open, displaying the existing serial range information with no value for the OPTAR ID.

Figure 6.17
Duplicating
an Existing
Serial Range

4. Select the desired OPTAR ID from the **OPTAR** drop-down list and modify any other desired information.
5. Change the **Beginning Serial** and **Ending Serial** if necessary to ensure the duplicate serial range does not overlap an existing serial range.
6. Select the **Save** button. FASTDATA will inform you that the serial range was successfully saved.
7. Select the **Close** button to close the Serial Range window. The new serial range will display on the Site Maintenance window **Serial Ranges** tab.

■ **Steps for Modifying a Serial Range**

When you're modifying a serial range, access to the data fields depends on whether the site or serial range has been exported.

1. From the Site Maintenance window **Site ID's** list box, select the site for which you wish to modify a serial range.
2. On the Site Maintenance window **Serial Ranges** tab, select the serial range you wish to modify.

3. Select the **Modify** button. The Serial Range window will open, allowing you to modify the fields you have access to.

To modify a serial range from the FA Maintenance window, select the **Serial Ranges** tab, select the serial range you wish to modify, then select the **Modify** button. Refer to Chapter 5.

Figure 6.18
Modifying a
Serial Range

4. You can modify the **Site** code if the serial range has not been exported nor deactivated and not yet acknowledged. If you change the site, you will remove the association between the serial range and OPTAR.
5. You can modify the serial range **Description**.
6. You can modify the **Ending Serial** range number if the serial range has not been exported, nor deactivated and not yet acknowledged. The new number cannot be greater than the current one.
7. You can modify the **SDN UIC** if the serial range has not been exported.
8. You can modify the **OPTAR**.
9. You can modify the **Service Code**.
10. You can modify the **Deactivate** check box setting.

Tip When you deactivate a range by selecting the **Deactivate** check box, the deactivation will not take effect until you export to the site and the site imports the deactivation data. After the site imports the deactivated serial range, that range will no longer be available to the site.

11. When adding or modifying serial range information, you must check at least one **Document Type** check box. If the serial range has been exported to the site, you cannot change the selected **Document Type**.

12. If you wish to modify the RC associated with the serial range, select the **Change RC** button. The Change FY/QTR/RC window will open. Modify the RC. Select **OK** to close the Change FY/QTR/RC window.
13. Select the **Save** button to save your serial range changes. The Serial Range window will close.

■ Steps for Deleting a Serial Range

If a serial range has been exported to a site, you can delete it only if it meets the following conditions:

- The site never used the serial range (the last number used is **00000**).
- The serial range has been deactivated and re-exported to the site.
- The site has imported the file containing the deactivated serial range and rebuilt the financial framework, including the deactivated serial range.
- The FA imported site data, including the deactivated serial range, and the range is now confirmed as deactivated.

Refer to the Deactivating, Deleting, and Reusing Serial Ranges help topic for additional information on deleting serial ranges.

1. From the Site Maintenance window **Site ID's** list box, select the site for which you wish to delete the serial range.
2. From the **Serial Ranges** tab, select the serial range you wish to delete.
3. Select the **Delete** button. FASTDATA will prompt you to confirm the deletion.

- To delete a serial range from the FA Maintenance window, select the **Serial Ranges** tab, select the serial range you wish to delete, then select the **Delete** button. Refer to Chapter 5.

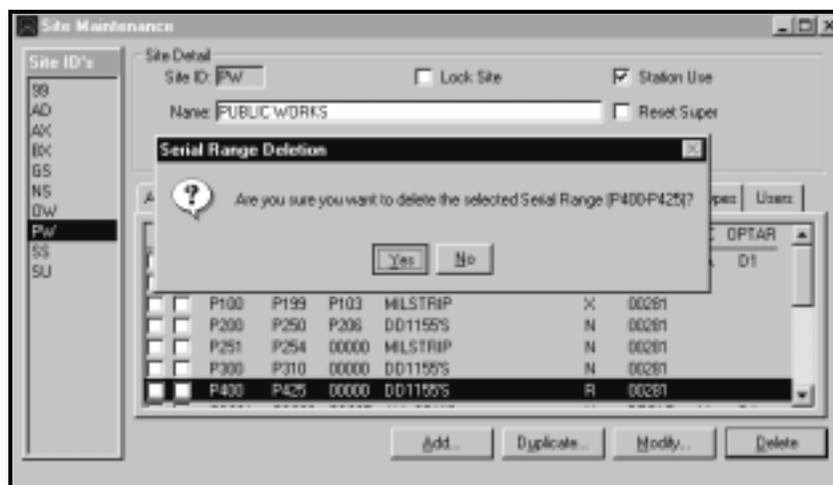


Figure 6.19
Deleting a
Serial Range

4. Select the **Yes** button to confirm the deletion. FASTDATA deletes the serial range from the Site Maintenance window **Serial Ranges** tab.

• Site Maintenance Window Authorizations Tab Objects

The **Authorizations** tab displays information about authorizations associated with the selected site. You can add, duplicate, and delete authorizations and view authorization details from this tab. This tab is unavailable if the user's access on the FA User Maintenance window **Funds** setting is **No Access**.

To quickly locate an authorization, shift window focus to the **Authorizations** tab authorizations list by using the TAB key or clicking on the **Authorizations** tab's window. Begin typing the desired authorization ID and focus will shift to the row of authorization data for the entered ID.

To maintain authorization data on the Site Maintenance window, first select the **Authorizations** tab. Add a new authorization by selecting the **Add** button. To duplicate an existing authorization, select the **Duplicate** button. You cannot duplicate an authorization if it is not associated with the currently active RC. To view authorization details, select the **Details** button. To delete an authorization, select the **Delete** button.

You can add, duplicate, and delete authorizations from the FA Maintenance and Site Maintenance windows **Authorizations** tabs and the Authorizations Maintenance window. The procedures are the same from any of these windows. This chapter addresses how to view and print authorization details. You can view and print authorization details from either the Site Maintenance window or the FA Maintenance window. For detailed information on adding, modifying, and deleting authorizations, refer to Chapter 9.

RC	OPTAR	Authorization	Total Authorizations	Total Obligations	Available Balance
AA	S1	550010	\$75,000.00	\$38,500.00	\$36,500.00
AA	S1	550020	\$100,000.00	\$101,000.00	(\$1,000.00)
AA	S1	550030	\$10,000.00	\$9,000.00	\$1,000.00
AA	S1	550040	\$0.00	\$0.00	\$0.00
			\$185,000.00	\$148,500.00	\$36,500.00

Figure 6.20
Site Maintenance
Authorizations
Tab

RC

Displays the RC IDs associated with the selected authorization.

OPTAR

Displays the OPTAR IDs associated with the authorization.

Authorization

Displays the authorization IDs for the listed OPTAR and RC.

Total Authorizations

The authorized amount through the active quarter.

Total Obligations

The obligated amount through the active quarter.

Available Balance

The YTD Authorizations less the YTD obligations.

Add

Opens the New Authorization window, allowing you to add a new authorization. This button is unavailable to users whose access on the FA User Maintenance window **Funds** setting is **Display-Only**.

Duplicate

Opens the New Authorization window, allowing you to add a new authorization under the selected site that will contain much of the same information as an existing authorization. You cannot duplicate an authorization if the current RC does not match the RC of the authorization you wish to duplicate. This button is unavailable to users whose access on the FA User Maintenance window **Funds** setting is **Display-Only**.

Details

Opens the Details for Authorization window, providing further information on the selected authorization.

Delete

Deletes the selected authorization. This button is unavailable to users whose access on the FA User Maintenance window **Funds** setting is **Display-Only**.

Site Maintenance Window Authorizations Tab Options

- **Add a new authorization**
- **Duplicate an existing authorization**
- **View and print authorization details**
- **Delete an authorization**

Remember that you can add, duplicate, and delete authorizations from the FA Maintenance and Site Maintenance windows **Authorizations** tabs and the Authorizations Maintenance window. This section focuses on viewing and printing authorization details from the Site Maintenance window **Authorizations** tab, although you can also view and print authorization details from the FA Maintenance window **Authorizations** tab. For detailed information on adding, modifying, and deleting authorizations, refer to Chapter 9.

Restrictions

- Only users with an FA User Maintenance window **Funds Update** access level can add, duplicate, and delete authorization data on the Site Maintenance window **Authorizations** tab.
- An FA User Maintenance window **Funds** access level of **Display-Only** limits users to view-only access to the Site Maintenance window **Authorizations** tab.
- An FA User Maintenance window **Funds** access level of **No Access** prevents a user from accessing the Site Maintenance window **Authorizations** tab.

■ Steps for Viewing and Printing Authorization Details

1. From the Site Maintenance window **Site ID's** list box, select the site for which you wish to view and print authorization details.
2. On the **Authorizations** tab, select the desired authorization and select the **Details** button.

The Details for Authorization window also opens from the FA Maintenance window when you select the **Details** button on the **Authorizations** tab. Refer to Chapter 5.

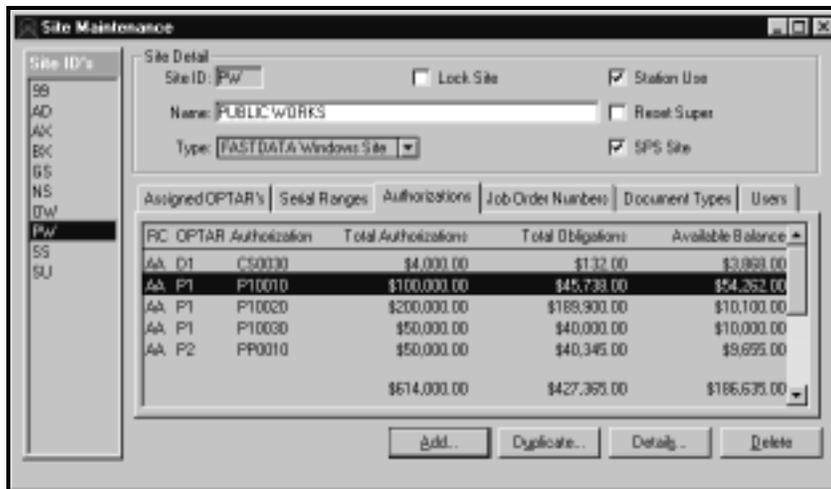


Figure 6.21
Viewing
Authorization
Details

The Details for Authorization window will open, displaying details on the selected authorization. The **Forward** and **Back** buttons are unavailable for selection on the window when you open the Details for Authorization window from the Site Maintenance window **Authorizations** tab.

JON	Description	Expense Element	Close Date	Obligated Amount
002810PW001	P10010 FENCED		00/00/0000	16,900.40
002810PW002	P10010 FENCED		00/00/0000	29,137.60

Figure 6.22
Details for
Authorization
Window

3. Select the **Print** toolbar button to open the Quick Print - Details for Authorization window. The window allows you to preview the report before actually printing it, save the contents of the report as a file, and print the report.

FOR OFFICIAL USE ONLY

PASTDATA (d fa site jon subcpt spt)

PA: N00261

Fiscal Year: 2000

JOB ORDER NUMBER REPORT

JON	Description	Expense Element
002810PW001	P10010 FENCED	
002810PW002	P10010 FENCED	

Figure 6.23
Quick Print -
Details for
Authorization
Window

4. Use the scrollbars and toolbar buttons to modify the view of the report.

Use the scrollbars to move through the report horizontally and vertically. Use the **VCR** buttons to access the first, previous, next and last pages of the report. Use the **Zoom** toolbar button to increase or decrease the magnification percentage of the displayed report to make it easier to read, or to reduce the display so that you can view an entire page. If you wish to see vertical and horizontal rulers on the report window, select the **Rulers** toolbar button.

5. Select the **Save As** toolbar button if you wish to save the report data in a file.
6. Select the desired page orientation, **Landscape** or **Portrait**.
7. Select the **Margin Offset** toolbar button if you wish to increase the left or top margin, depending on the selected page orientation. The wider margin allows for the punching of holes on the printed report.

8. Select the **Print** toolbar button if you wish to print the displayed Details report.
9. Select the **Close** button to close the Quick Print window and return to the Details for Authorization window.
10. Select the **Close** button to close the Details for Authorization window.

• Site Maintenance Window Job Order Numbers Tab Objects

The **Job Order Numbers** tab displays information about JONs associated with the selected site. You can add, duplicate, and delete JONs from this tab. The **Duplicate** button is unavailable if the JON you select for duplication is not associated with the currently active RC. Access to JON data is defined on the FA User Maintenance window; users can have **No Access**, **Update**, or **Display-Only** access. To add, duplicate, and delete JONs, users must have **Job Orders Update** access. This tab is unavailable if the user's access on the FA User Maintenance window **Job Orders** setting is **No Access**.

To quickly locate a JON you wish to see, shift window focus to the **Job Order Numbers** tab JONs list by using the TAB key or clicking on the **Job Order Numbers** tab window. Begin typing the desired JON and focus will shift to the row of JON data for the entered JON. If a JON has a labor authorization as well as a non-labor or both labor and non-labor authorization, FASTDATA will list the JON twice: once for each authorization.

Add a new JON by selecting the **Add** button. To duplicate an existing JON, select the **Duplicate** button. To delete a JON, select the **Delete** button. You cannot delete a JON if it has been exported to the site.

You can add, duplicate, and delete JONs from either the Site Maintenance window or FA Maintenance window **Job Order Numbers** tabs, or from the Job Order Number Maintenance window. The procedures are the same from any of these windows. Refer to Chapter 10 for detailed information on adding, duplicating, modifying, and deleting JONs.

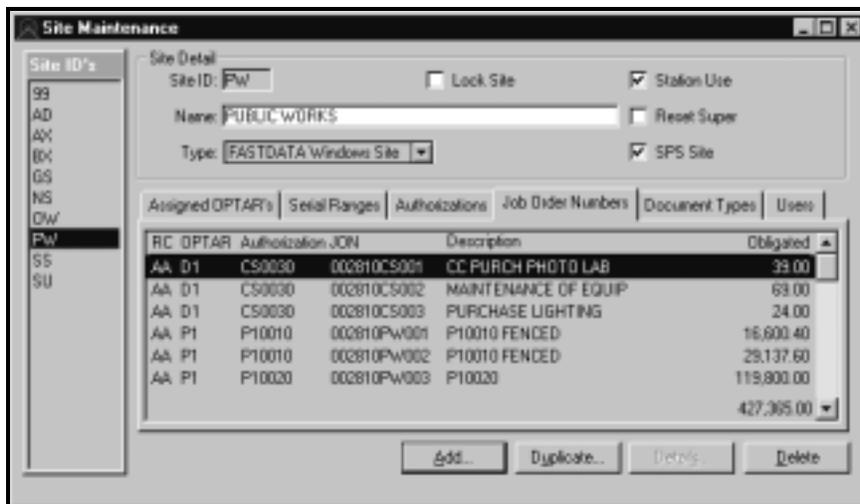


Figure 6.24
Site Maintenance
Job Order
Numbers Tab

RC

Displays the RC IDs associated with the selected JON.

OPTAR

Displays the OPTAR IDs associated with the JON.

Authorization

Displays the authorization ID for the listed RC and OPTAR.

JON

Displays the JON for the listed RC, OPTAR, and authorization.

Description

Briefly describes the JON.

Obligated

The obligated amount for the JON.

Add

Opens the New Job Order Number window, allowing you to add a new JON. This button is unavailable if the user's access on the FA User Maintenance window **Job Order Numbers** setting is **Display-Only**.

Duplicate

Opens the New Job Order Number window, allowing you to add a new JON under the selected site that will contain much of the same information as an existing JON. You cannot duplicate a JON if the current RC does not match the RC of the JON you wish to duplicate. This button is unavailable if the user's access on the FA User Maintenance window **Job Orders** setting is **Display-Only**.

Delete

Deletes the selected JON. This button is unavailable if the user's access on the FA User Maintenance window **Job Orders** setting is **Display-Only**.

Site Maintenance Window Job Order Numbers Tab Options

- **Add a new JON**
- **Duplicate an existing JON**
- **Delete a JON**

Remember, you can add, duplicate, and delete JONs from either the Site Maintenance window or FA Maintenance window **Job Order Numbers** tabs, or from the Job Order Number Maintenance window. Therefore, details for these options are not discussed in this chapter. Refer to Chapter 10 for detailed information on adding, duplicating, modifying, and deleting JONs.

Restrictions

- Only users with an FA User Maintenance window **Job Orders Update** access level can add, duplicate, and delete job order number data on the Site Maintenance window **Job Order Numbers** tab.
- An FA User Maintenance window **Job Orders** access level of **Display-Only** permits users view-only access to the data on the Site Maintenance window **Job Order Numbers** tab.
- An FA User Maintenance window **Job Orders** access level of **No Access** prevents a user from accessing the Site Maintenance window **Order Numbers** tab.

• **Site Maintenance Window Document Types Tab Objects**

The **Document Types** tab allows FA users who run the site export process automatically (using the Automated Processes window) to update the selected site's access to various document types without having to open the Export Site window.

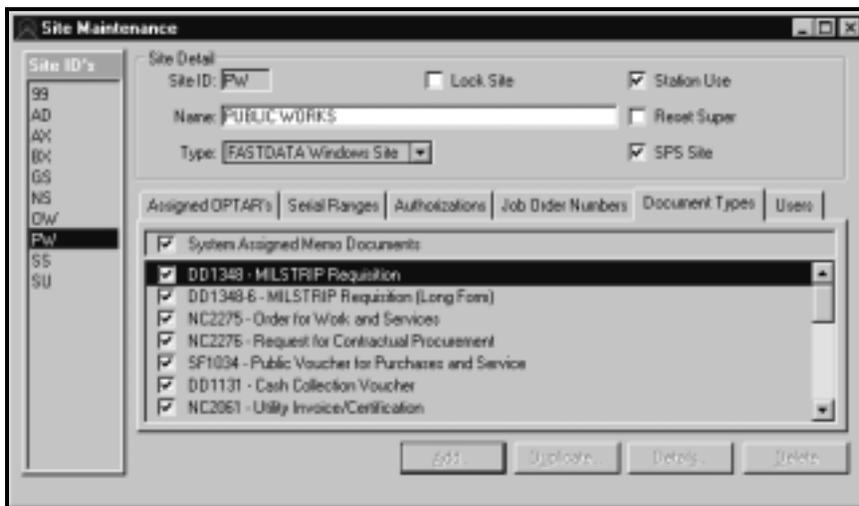


Figure 6.25
Site Maintenance
Document Types
Tab

This tab lists the document types available in FASTDATA. Check boxes control access to the listed document types for the selected site.

Add

This button is unavailable from the **Document Types** tab.

Duplicate

This button is unavailable from the **Document Types** tab.

Details

This button is unavailable from the **Document Types** tab.

Delete

This button is unavailable from the **Document Types** tab.

Site Maintenance Window Document Types Tab Options

- Update site access to document types

Restrictions

- Only users with an FA User Maintenance window **Sites Update** access level can update site access to the document types on the Site Maintenance window **Document Types** tab.
- An FA User Maintenance window **Sites** access level of **Display-Only** limits users to view-only access to the Site Maintenance window **Document Types** tab.
- An FA User Maintenance window **Sites** access level of **No Access** prevents a user from accessing the Site Maintenance window.

■ *Steps for Updating Site Access to Document Types*

The Site Maintenance window **Document Types** tab allows FA users who run the site export process automatically (using the Automated Processes window) to update the selected site's access to various document types without having to open the Export Site window.

1. Select the desired site from the **Site ID's** list.

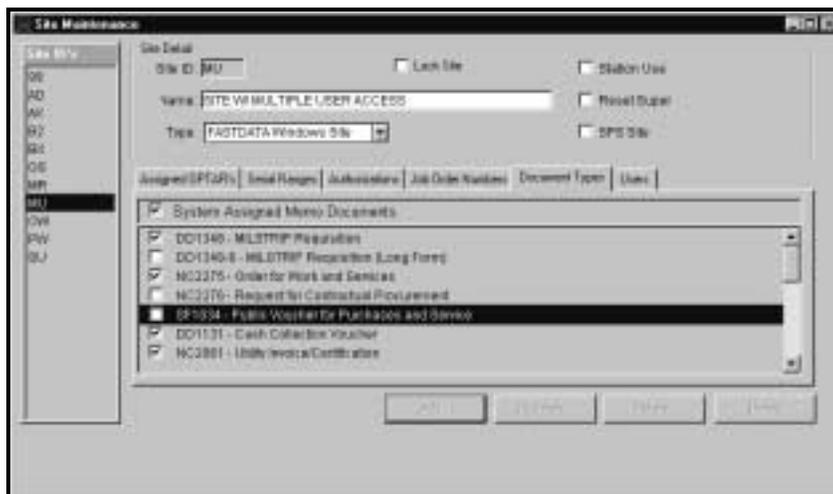


Figure 6.26
Updating
Document
Types for
Automatic
Export

2. Select or unselect the desired document type(s) for the selected site.

Tip The **System Assigned Memo Documents** check box controls whether the site users must manually enter document numbers when creating new FASTDATA memo documents or whether the Site application will generate new memo document numbers automatically from the FA-generated serial ranges. If checked, the Site application will automatically generate the document number when the user creates a new memo document of the applicable types.

3. Select the toolbar **Save** button to save your changes.

• Site Maintenance Window Users Tab Objects

The **Users** tab allows users to review the users assigned to a site without having to open the Site User Maintenance window. The information on the **Users** tab is display-only. If you want to update, delete, or create site users, you must do so from the Site User Maintenance window.

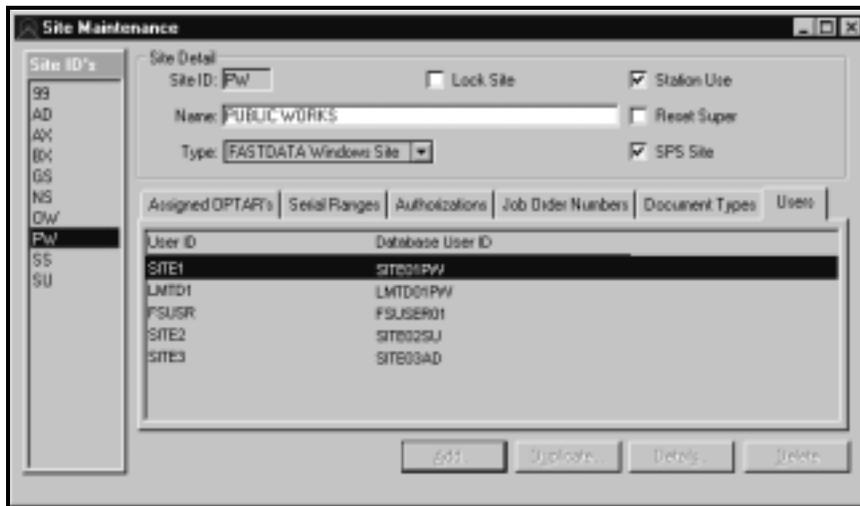


Figure 6.27
Site Maintenance
Users Tab

User ID

Identifies a user assigned to the selected site by user ID.

Database User ID

Identifies a user assigned to the selected site by database user ID.

Add

This button is unavailable from the **Users** tab.

Duplicate

This button is unavailable from the **Users** tab.

Details

This button is unavailable from the **Users** tab.

Delete

This button is unavailable from the **Users** tab.

R Site Maintenance Window Users Tab Options

- **View users assigned to a site**

Restrictions

- An FA User Maintenance window **Sites** access level of **No Access** prevents a user from accessing the Site Maintenance window.

■ Steps for Viewing Users Assigned to a Site

The **Users** tab allows FA users to view the users assigned to a site without having to open the Site User Maintenance window. The **Users** tab information is for display only.

- Select the desired site from the **Site ID's** list.

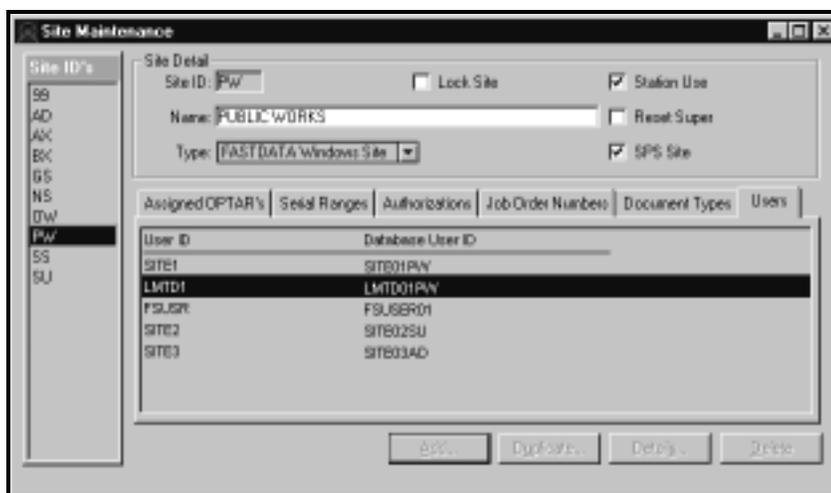


Figure 6.28
Viewing
Assigned Site
Users

The **Users** tab will display the users assigned to the selected site. You cannot modify the displayed data; if you wish to add, update, or delete site user data, you must do so through the Site User Maintenance window.

• Lock Sites Window Objects

Use the Lock Sites window to lock or unlock one or more of your sites. You cannot lock DOS sites. Site locking can be useful for end-of-month reconciliation between FASTDATA and STARS-FL. Access to the Lock Sites process is defined on the Site User Maintenance window; users can have **No Access**, **Update**, or **Display-Only** access to locked sites. To lock a site, at least one user at the site must have a **Locked Site Access** value of **Update** or **Display-Only** and an **Import, Export Data** value of **Access** assigned.

To open the Lock Sites window, select **Lock Sites** from the **Process** menu.

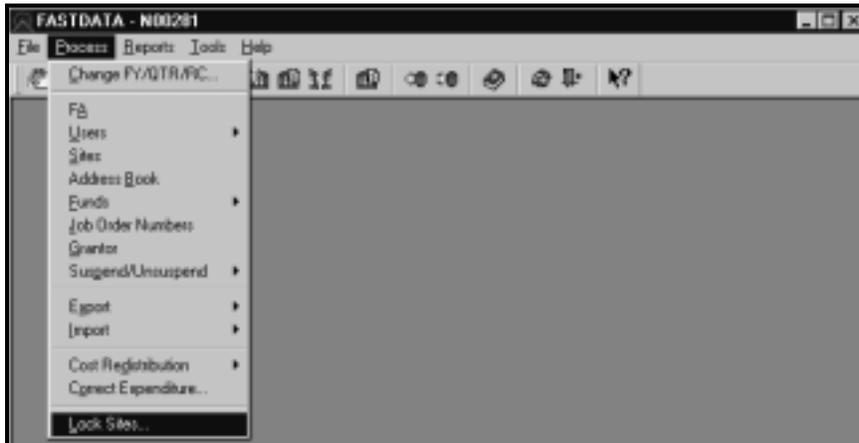


Figure 6.29
Opening the Lock
Sites Window

The Lock Sites window will open.

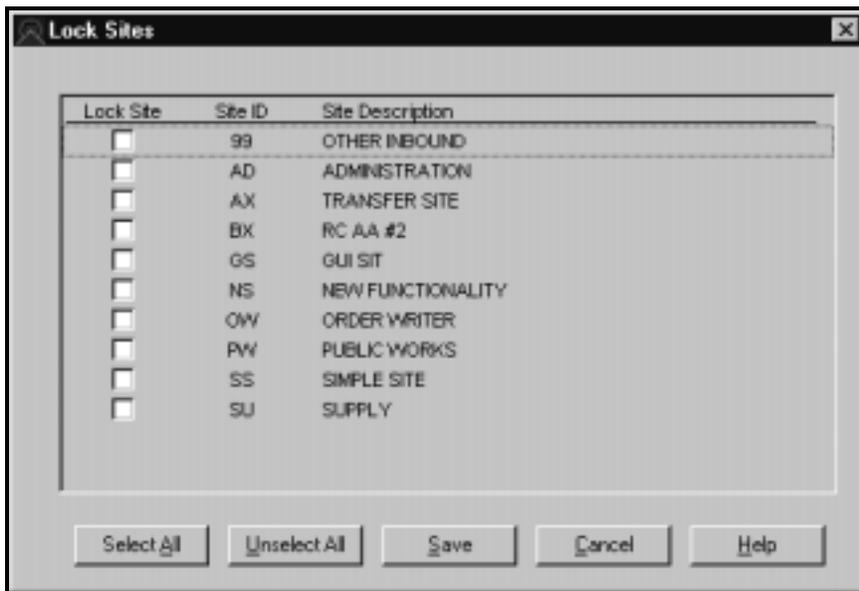


Figure 6.30
Lock Sites Window

Lock Site

Controls whether the site will be locked. Check or uncheck each site you wish to lock or unlock, as applicable.

Site ID

Lists the two-character site ID.

Site Description

Briefly describes the listed site.

Select All

Selects all listed sites for locking.

Unselect All

Unselects all listed sites. Unchecked sites will not be locked.

Save

Saves your changes and closes the Lock Sites window.

Cancel

Terminates the action to lock one or more sites and closes the Lock Sites window.

Help

Opens the help topic for the Lock Sites window.

Restrictions

- Only sites for which at least one user has been assigned a **Locked Site Access** of **Update** or **Display-Only** access level and **Import, Export Data Access** on the Site User Maintenance window can be locked on the Site Maintenance and Lock Sites windows.
- A Site User Maintenance window **Locked Site Access** of **Display-Only** access level limits a user to view-only access to data for the locked site.
- A Site User Maintenance window **Locked Site Access** of **No Access** prevents a user from accessing the site.

R **Lock Sites Window Options**

- **Lock/unlock sites**

■ **Steps for Locking/Unlocking Sites**

Use the Lock Sites window to lock or unlock one or more of your sites. You cannot lock a site until you have assigned both **Update** or **Display-Only Locked Site Access** and **Access** for **Import, Export Data** access rights to at least one user for the site you wish to lock, using the Site User Maintenance window. This ensures that there is someone at the site who can import the file from you when you unlock the site.

Site users with a **Display-Only** setting can view reports and documents at the site when it's locked, but cannot add or change documents. Users with a **No Access** setting for the **Locked Site Access** option cannot access the site when it is locked.

1. On the Lock Sites window, check or uncheck the **Lock Site** check box of each site you wish to lock or unlock, respectively.

You can use the **Select All** and **Unselect All** buttons to select or unselect all listed sites.

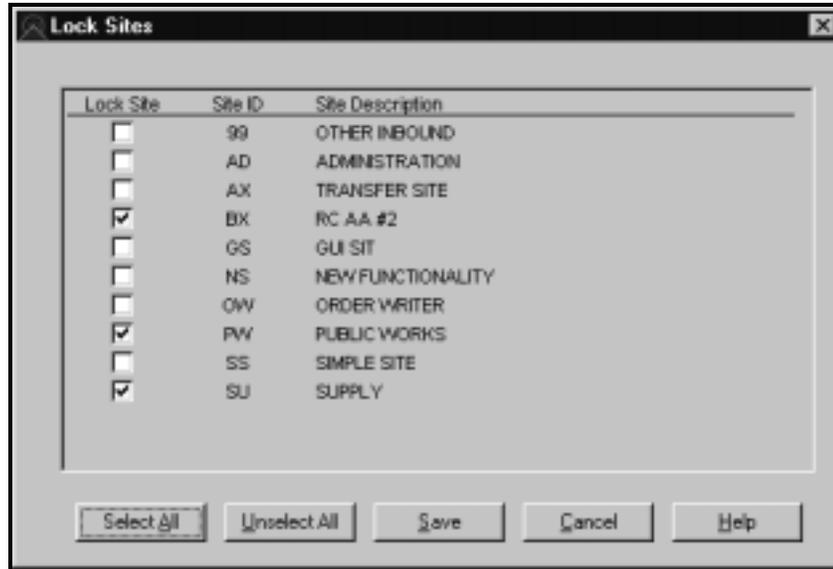


Figure 6.31
Locking
Selected
Sites

For the above example, three sites have been selected for locking. If you select a site for locking for which no user with full access rights has been designated, FASTDATA will display a message informing you so.

2. Select the **Save** button to save your changes and close the window.

After locking or unlocking sites, you must export to each site you locked or unlocked to actually have the locking or unlocking action take effect.