CONTENTS

OVERVIEW........................................................................................................1

PROCESSING DOCUMENTS AT THE RF..................................................1

USING THE SYSTEM....................................................................................3

SIGNING ON TO THE WEBSITE.................................................................3

ACCESSING THE SYSTEM.........................................................................4

THE SYSTEM’S MAIN PAGE.................................................................5

LOCATING YOUR DOCUMENT ID NUMBER...........................................6

THE TRACKING DETAILS PAGE...............................................................7
SECTION 1: OVERVIEW

The online Document Tracking System has been developed to enable you to track the processing status of the following types of documents:

- Payment Requests
- Travel Expense Vouchers
- Travel Advance Requests
- Purchase Requisitions

Processing Documents at the RF

When any of these documents are received by the RF, they are processed in the following manner:

Step 1: Upon receipt, the Mailroom scans each bar coded form into the Document Tracking System. From this point on, all processing actions are tracked within the system. The Mailroom forwards forms to the OTPS administrators.

Step 2: OTPS administrators review the documents for completeness and then forward them to the appropriate project administrators.

Step 3: The project administrators approve and encumber Payments/Purchase Requisitions against appropriate accounts.

Step 4: OTPS clerks then enter Payments and Purchase Requisitions.

Step 5: Checks and Purchase Orders are issued. Checks are issued the following business day and Purchase Orders are issued on the same day.
Processing Documents at the RF
SECTION 2: USING THE SYSTEM

Signing On to the RF Website

To access the Document Tracking System, visit the Research Foundation’s website at http://www.rfcuny.org and then click on the Sign In button on the upper right-hand corner of your screen (see figure 1).

![The RFCUNY Website: Figure 1](image1)

This will bring up a sign in box (see figure 2).

![Figure 2](image2)
At the sign in box:

1) Select **PI, Assistant, Grant Officer** as your sign in role *(see figure 3)*
2) Enter your user ID and password and then click **enter** to log on to the RF website

![Sign In]

*Figure 3*

**Accessing the System**

Once you have successfully logged on to the RFCUNY website, select **Managing Your Awards** from the main menu, highlight **E-Services** and then select **Document Tracking** *(see figure 4)*. This will direct you to the Document Tracking System’s main page.

![Accessing the Document Tracking System: Figure 4]

User Manual Page: 4 of 7
The System’s Main Page

On the Document Tracking System’s main page, enter your Document ID number and click the Process button to view the status of your document (see figure 5).
Locating Your Document ID Number

Your Document ID number can be found under the bar code of your document (see figure 6).

When you have entered your Document ID Number and clicked the Process button, the Tracking Details Page will appear (see figure 7), which will display the status of your document.

Note: You must enter a valid Document Number to view the status of your document. Without a valid number, the system will not allow you to proceed.
The Tracking Details Page

The Tracking Details Page displays the current processing status of your document as well as the processor’s name (Scanned By), the processor’s department (Department), the time processed (Scan Date) and any comments entered by the processor (Comments).

<table>
<thead>
<tr>
<th>Scanned By</th>
<th>Department</th>
<th>Scan Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob Jones</td>
<td>Grants and Contracts</td>
<td>9/20/2004 4:30:03 PM</td>
<td></td>
</tr>
<tr>
<td>Susan Davis</td>
<td>OPTh Step 2</td>
<td>9/21/2004 3:59:07 PM</td>
<td></td>
</tr>
<tr>
<td>Close Out</td>
<td>Final Processing</td>
<td>9/21/2004 4:08:48 PM</td>
<td></td>
</tr>
</tbody>
</table>

Note: “Final” signifies check to be issued on the following business day. Purchase Orders on same day.

The Tracking Details Page: Figure 7

To view the status of another document, click the Back to Main Page button and repeat the process described above.