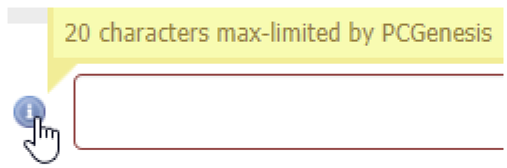
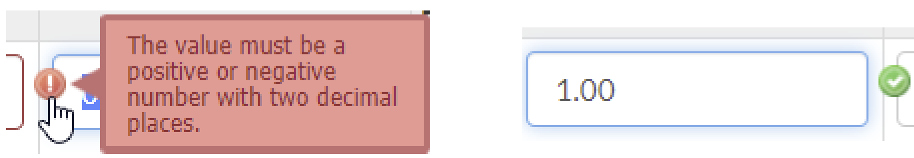
Data Entry Notes & FAQs

1. **What if I forget a REQUIRED field and try to SUBMIT the form?**
    a. Required fields are usually marked with a red asterisk (*). However, if you should bypass one, the form will “let you know” when you hit the Submit button. The font color of the field you missed will turn red and a red “info bubble” will appear, usually to the right of the field. You can hover over the bubble to see any specific error message. Examples shown below.

2. **What are the blue bubbles next to some fields?**
    a. These are tool tips. Hover over the bubble for helpful tips specific to the field you are addressing. Example shown below.



3. **How should I enter pricing data and currency?**
    a. You will need to include the decimal and cents (even for whole dollars “1.00”) If you fail to do so, you will get a red info bubble. Once you have corrected the pricing/currency format, you will get a green check mark.



4. **Can QUANTITY be a decimal?**
    a. No, it must be a whole number. The form will require a whole number.

5. **What is the maximum number of line items I can request?**
    a. The form is limited to 100 separate line items.

6. **How do I include “Shipping & Handling?”**
    a. Include it as a Line Item with ITEM NO. / DESCRIPTION of Shipping and Handling.

* QUANTITY	UNIT	* ITEM NO. / DESCRIPTION	* UNIT PRICE	EXTENDED PRICE
1	ea	Shipping & Handling	15.50	15.50

7. **How do I enter a discount code, coupon, etc.?**
    a. Include it as a Line Item with ITEM NO. / DESCRIPTION of Shipping and Handling.

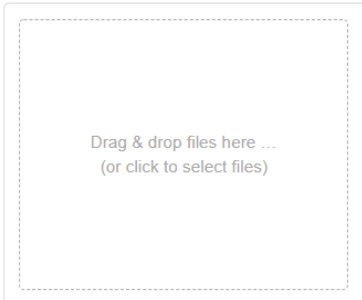
* QUANTITY	UNIT	* ITEM NO. / DESCRIPTION	* UNIT PRICE	EXTENDED PRICE
1	ea	Discount Coupon Code K12ROCKS	-12.50	-12.50

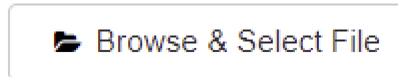
Key the - sign first.

8. How do I add or delete a line item or row?

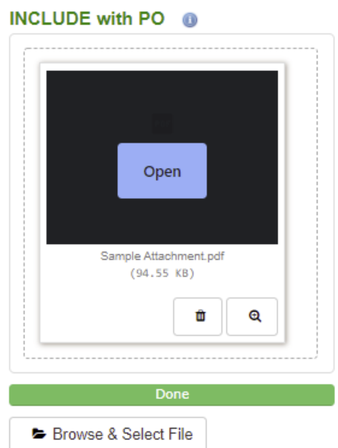
   + Add a new Row   - Remove the Adjacent Row

9. **How do I attach documents to the form?**
   a. You can either drag & drop them into the identified area or use the Brose & Select file button.





   b. Example of a successfully attached file.



10. **How do I know which page I am on within the portal?**
    a. The portal page "tabs" will turn white when you are active on the tab.

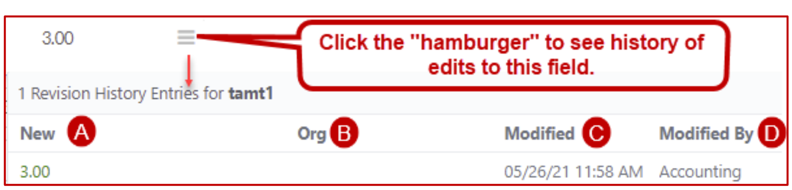
11. **Can I save my work before submitting the request?**
    a. Yes, click on the **Save & Finish Later** button.
    b. You receive the following message.

Success! A DRAFT of your form was successfully saved! Check your email for a link to return to it when you are ready.

    c. Check your email. When you are ready to resume, use the link provided.

12. **If I am an Approver or Processor of forms, can I start a form too?**
    a. Yes, but there is a caveat. If you are in the workflow of the form and originate one, you will be in the workflow twice, once as originator and the other as your "regular" spot.

13. **How can I tell if changes have been made to the form since origination?**
    a. The field will have a "hamburger" icon. If you click the icon, you will be able to see the history of changes.



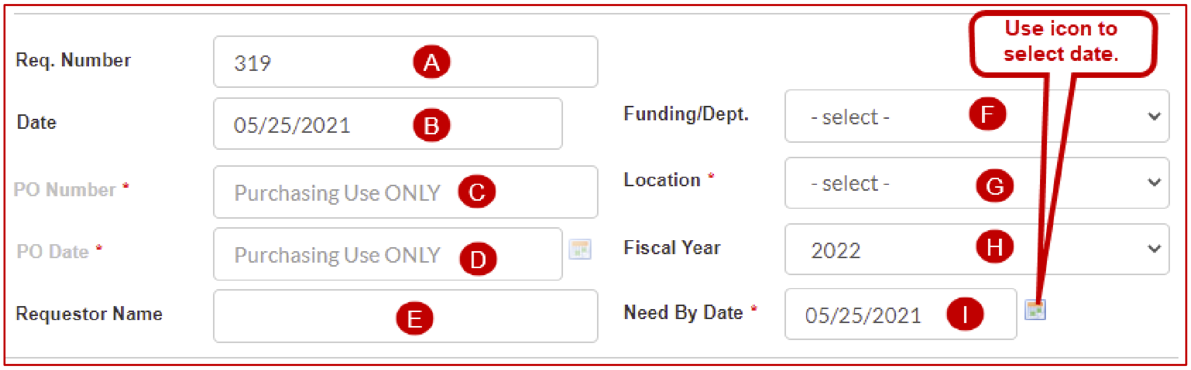
A. New Value (New)
B. Original Value (Org)
C. Date/Time stamp of change (Modified)
D. Username of User that made the change (Modified By)

Select the Form

Login to our myinformaportal.com/mcintosh. Click on the Purchase Requisition button on the Form Library page to start a form.

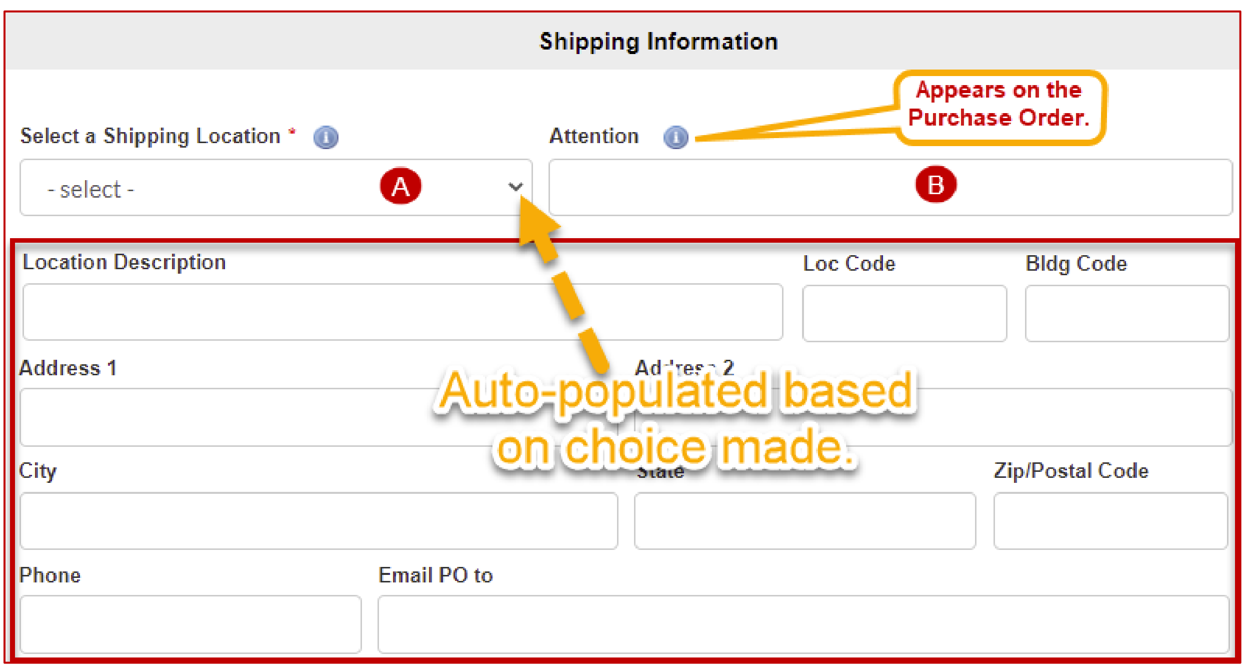
****Please do NOT use commas when describing your items or anywhere else on this form.****

Requisition Header Information



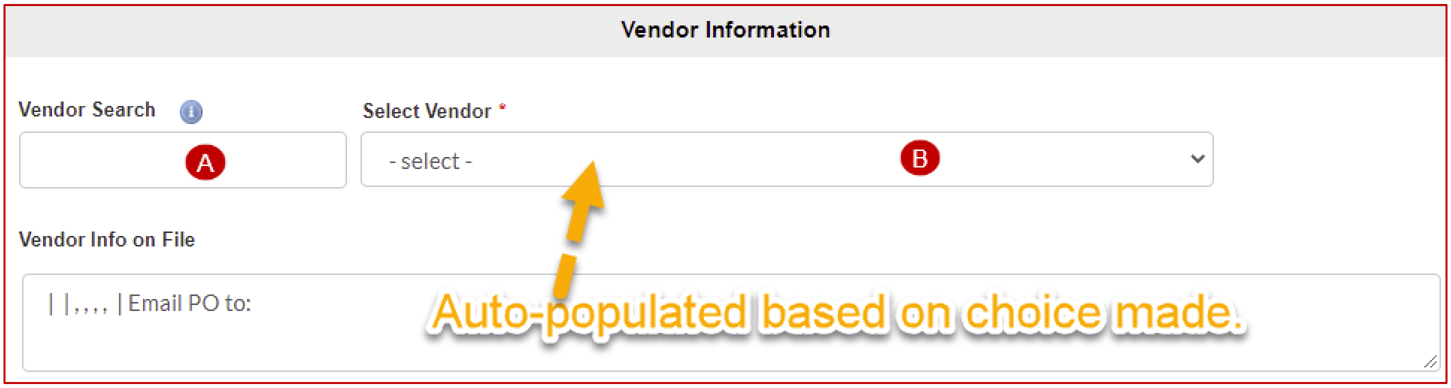
A. **Req Number:** Automatically increments.
B. **Date:** Defaults to TODAY and is not editable.
C. **PO Number:** As shown, for Purchasing Use ONLY.
D. **PO Date:** As shown, for Purchasing Use ONLY.
E. **Requestor Name:** This *should* populate the originator's name on file within the Logiforms member database.
F. **Funding/Dept:** If you know how your purchase will be funded. (Sometimes called Requisition Type)
G. **Location:** This field controls the workflow of the Requisition and "Send to" options your will receive. **(REQUIRED)**
H. **Fiscal Year:** Select the correct Fiscal Year of your purchase. We will default to most common option. **(REQUIRED)**
I. **Need By Date:** Defaults to TODAY but you can change to accurately reflect when items are needed. **(REQUIRED)**

Shipping Information



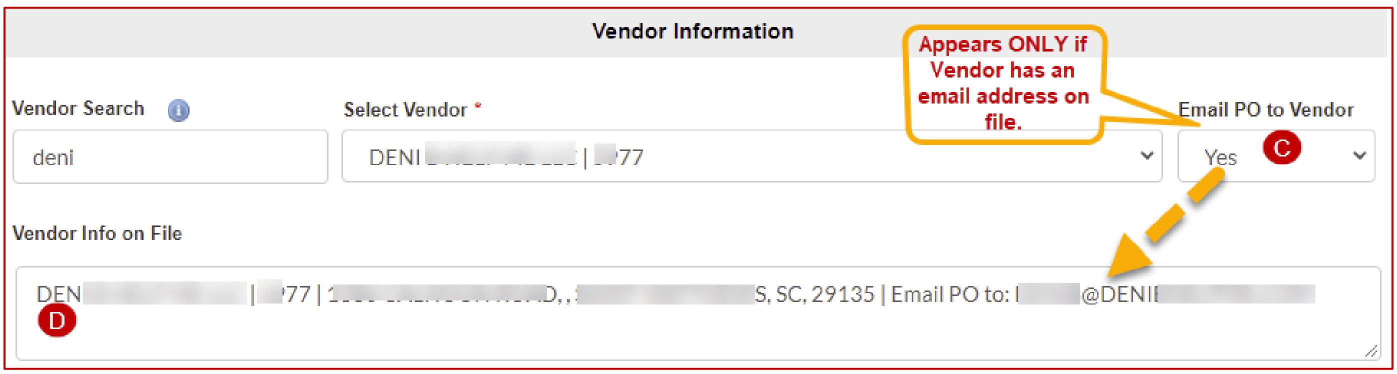
A. **Select a Shipping Location:** Select the appropriate Shipping Location. **(REQUIRED)**
B. **Attention:** If you would like a specify a name (or yourself) on the Purchase Order ATTENTION line.

Vendor Information



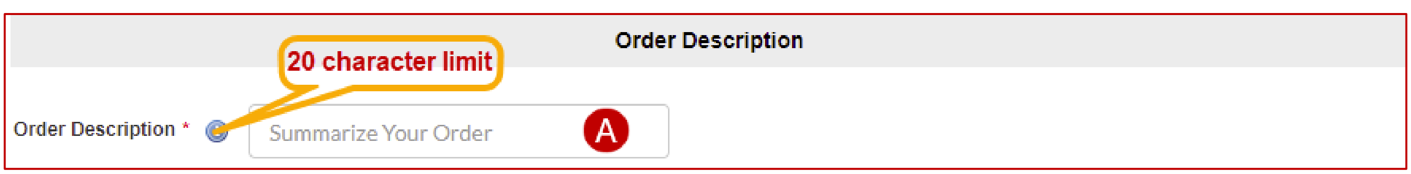
A. **Vendor Search:** Enter part of the Vendor's Name or the Vendor Number.
B. **Select Vendor:** Select a Vendor from the filtered list created from your Vendor Search. **(REQUIRED)**

Vendor Selection Notes



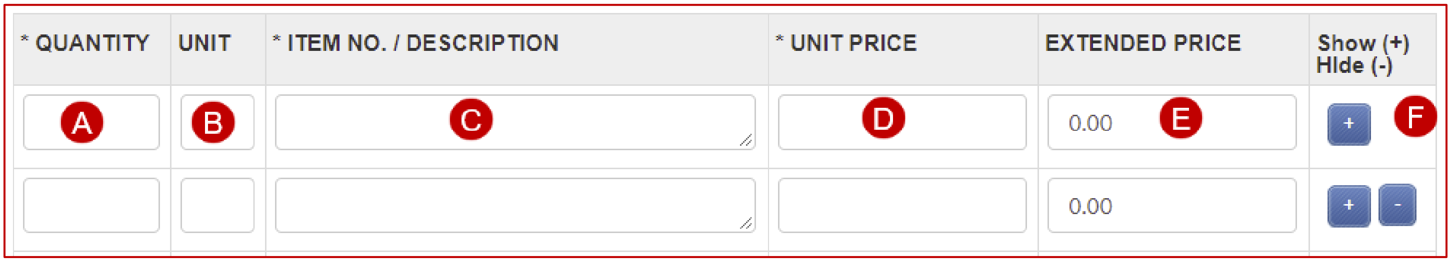
C. **Email PO to Vendor:** Defaults to "Yes" and only appears if there is an email address on file in Logiforms.
If you do NOT want the PO Emailed Directly to the Vendor change the "Yes" to "No."
D. **Vendor Info on File:** This is for informational purposes only and is not editable.

Order Description



A. **Order Description:** Enter a short (2-character limit) description of your purchase. **(REQUIRED)**

Item Detail Section

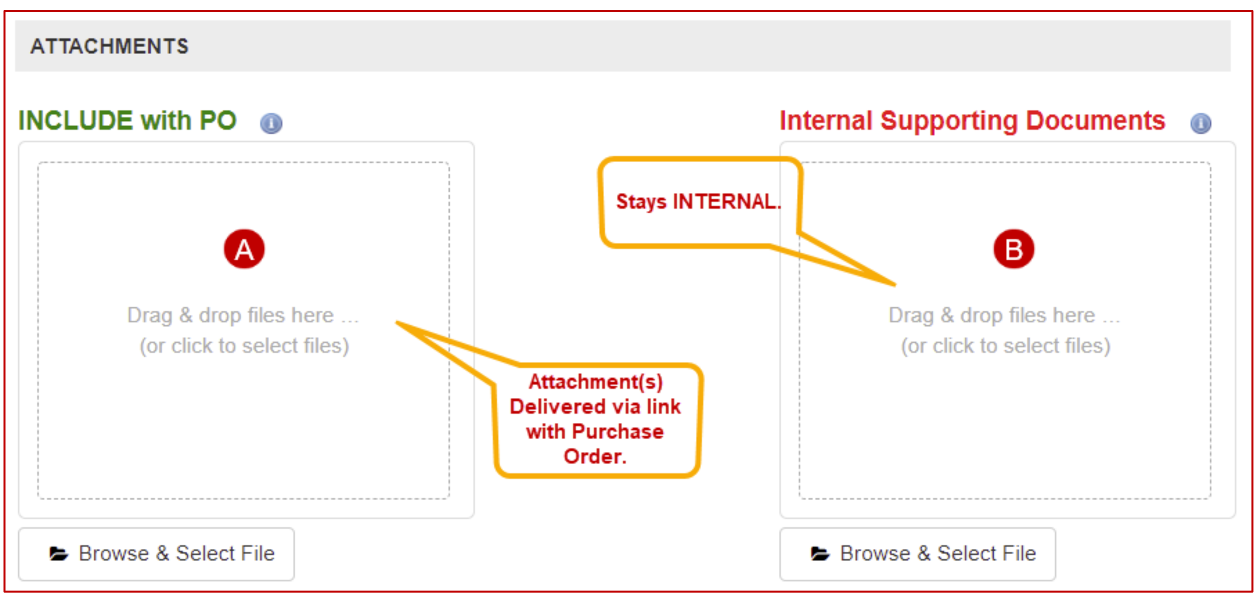


A. **QUANTITY:** Must be a whole number. **(REQUIRED)**
B. **UNIT:** Maximum of two character. (Examples: **EA** for Each, **BX** for Box, etc.)
C. **ITEM NO. / DESCRIPTION:** Enter the vendor's item number and description, this prints on the PO. **(REQUIRED)**
D. **UNIT PRICE:** Enter amount per unit including cents and decimals. **(REQUIRED)**
E. **EXTENDED PRICE:** Automatically calculated using **QUANTITY x UNIT PRICE = EXTENDED PRICE**.
F. **Show (+) Hide (-):** Click the **+** sign to add a new line item and the **–** sign to delete the line item on that row.

PO Notes Section

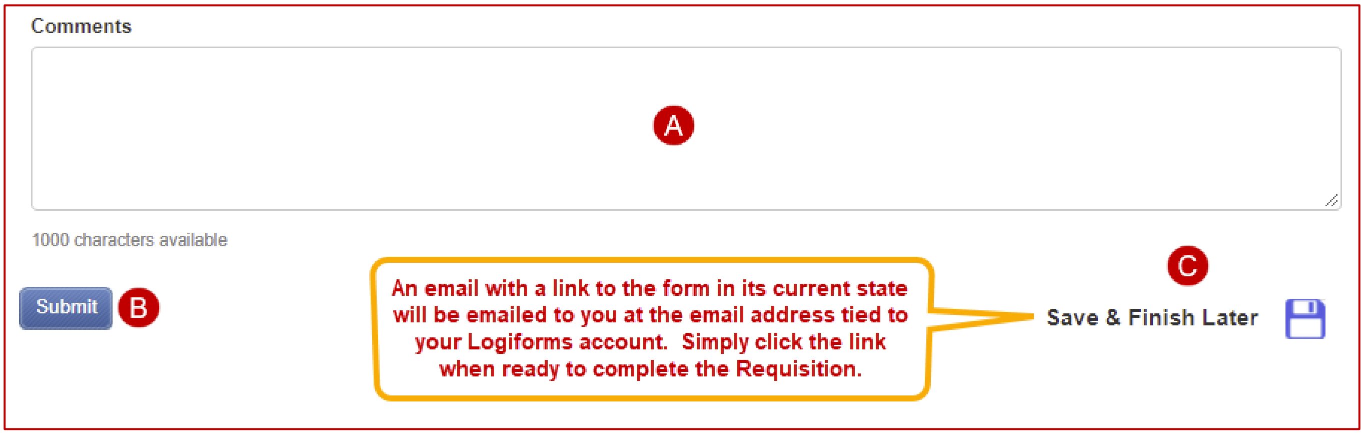
A. **PO Notes:** If you have some specific information or notes to include on the Purchase Order, you can enter them here.

Attachments



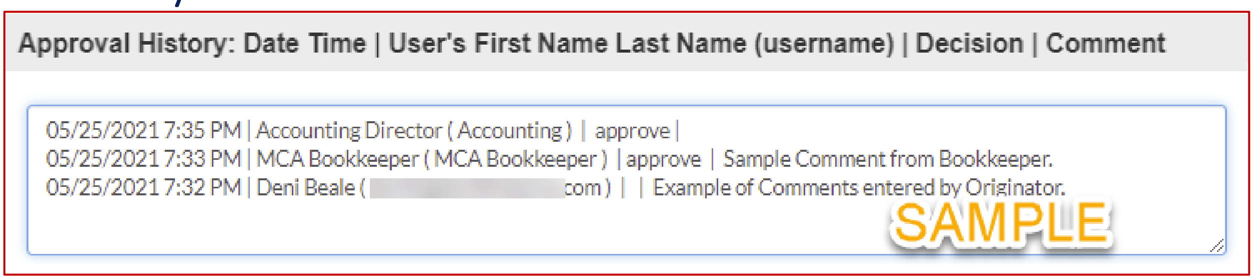
A. **INCLUDE with PO:** Attachments you want included with the PO (via link).
B. **Internal Supporting Documents:** Attachments like bids and other proposals.

Comments, Submit, and “Drafts”



A. **Comments:** Internal information only. These comments will NOT be on the Purchase Order but WILL be visible to ALL folks included within the workflow.
B. **Submit:** When you have completed the form, hit this button to Submit your request. **(REQUIRED)**
C. **Save & Finish Later:** Use this feature to save a copy of your Requisition so you do not need to start from scratch later.

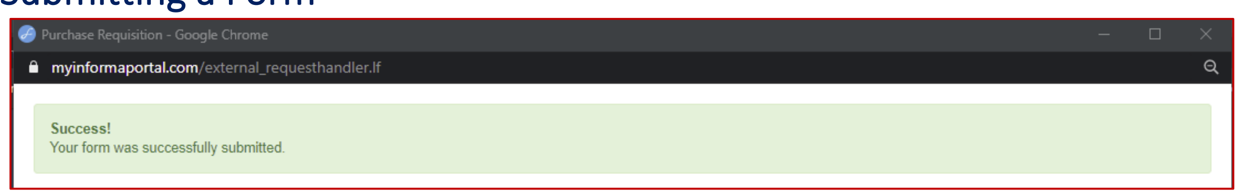
Approval History



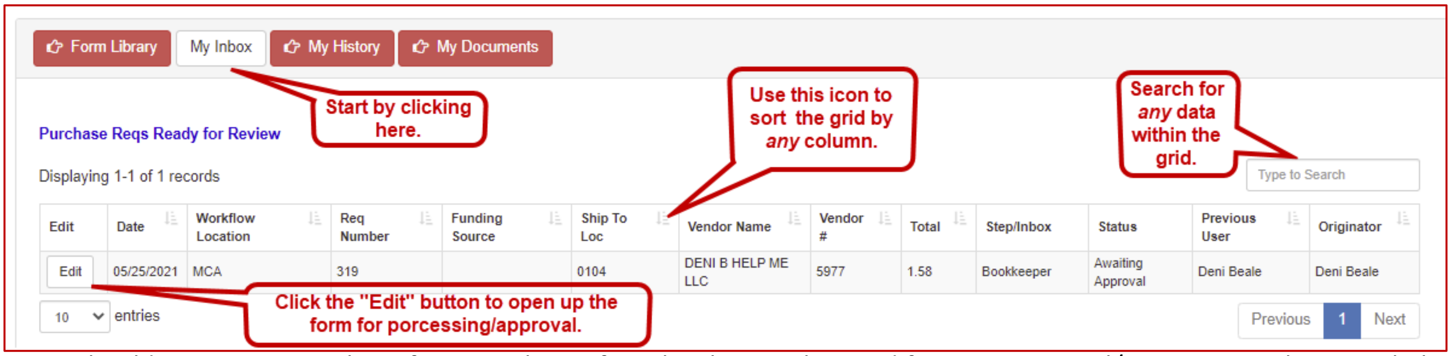
A. **Approval History** (This could also be labeled Audit History): The Approval History starts with a blank field. It builds in bottom-up order with the newest approval information at the top. The following items are captured and copied to this field whenever a form is originated or processed. The fields are separated by a pipe “ | “ symbol.
   a. Date & Time of User’s Actions
   b. User’s First Name
   c. User’s Last Name
   d. User’s Username (in parenthesis)
   e. User’s Decision (Approve/Deny) This is blank when a form is originated.
   f. User’s Comment

   It is common to see multiple pipe symbols with nothing in between. Example: | |, this means the user did not enter a comment. This also happens when a form is originated since there is no “Decision” option for the user. If a user edits but does not submit the form, their view is recorded without a Decision and any changes made are lost.

After Submitting a Form

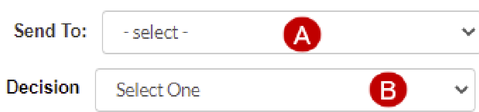


Processing/Approving a Requisition



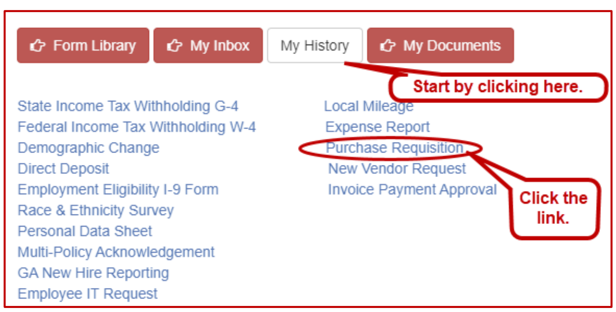
You *should* receive an email notification when a form has been submitted for your approval/processing. There is a link within the form to the My Inbox Approval Queue.

1. Click on the **My Inbox** button.
2. Locate the **Purchase Reqs Ready for Review Inbox**.
3. Select a Requisition to process by clicking on the related **Edit** button.
4. Review the Requisition by scrolling through it.
5. When you are ready to complete your process…
   a. **Send To:** Select the next user to send the form to. This list will be pre-filtered and may not even exist if the form's workflow has only one designated approver at the next step.
   b. **Decision:** Select the appropriate option.



   c. Hit the **Submit** button.

Checking on the Status of Requisition I Started or Processed



PLEASE NOTE
Your layout and list of available Form History may vary.

1. Click on the **My History** button.
2. Locate the **Purchase Requisition** link.

You can use the grid to determine the status of your request and who's Inbox it is assigned to and more. COMING SOON: There will be a button added to allow you to view the form and any attachments soon.