Online Order Forms

Updated 8.24.18
Purpose

The Online Order Form application was created to meet several needs of the Business Office and the College as a whole. Listed below, the purposes for implementing the online order forms are:

- Increase the ease of submitting orders
- Make the process for the Business Office more efficient
- Eliminate unnecessary paper use

Testing Phase

Our goal is to fully implement the Online Order Form application by September 1, 2018. We have already tested extensively and believe we are close to reaching that goal after this expanded testing phase.

Your assistance will help in two ways:

- Ensuring that submitting orders is user-friendly and bug-free
- Providing useful feedback for the Account Holder approval process

Thank you for helping us with this process. We hope that this application will useful and convenient for all parties involved.

Resources

All of the webpage links, as well as additional resources, are available on the CHS website at:

www.uky.edu/chs/ofa/online-order-forms

This page can also be found in the main menu of the website:

Faculty and Staff > Online Order Forms
Submitting Orders

1 Login

To submit an order, you must be logged in to the CHS website. To do that, click “login” in the top right-hand side of any page on the CHS website.

You will know you are logged in when you see a black/gray bar at the top of your screen that has “log out” at the top right-hand side of the page. Once you login, you should stay logged in as long as your browser is open.

2 Go to the Order Form page (do not log in from the order form page)

www.uky.edu/chs/eform/submit/purchasing-form

You can also access this page from the main menu of the website.

Faculty and Staff > Online Order Forms

The page should look like the image to the right:

Please note: As in states on the submission page, this form is incompatible with Internet Explorer, you may use any other browser.
Fill Out The Form

Descriptions of each field listed below.

- **Requester:** Required. The full name of the person requesting the order.
- **Requester Email:** Required. The email of the person requesting the order.
- **Requester Department:** Required. The department or office of the person requesting the order.

**This is for research subjects or guest lecturers:** Check this box if this order is for research subjects or guest lecturers. This will hide many of the fields which are unneeded for this type of order. *(Temporarily disabled)*

- **Select Vendor:** Dropdown with a list of vendors. If the needed vendor is not listed, select “New Vendor”.
- **Vendor Description:** If “New Vendor” was selected, use this text area to give a short description of the vendor. New Vendors will be added to the list over time.
- **Shipping Information:** Name and Room/Building required. Use the text fields in this section to indicate to whom and to where the order will be shipped.
- **Order item:** Quantity and Cost/Unit required. Use this section to add an individual order item. The numbers for Quantity and Cost/Unit will automatically calculate the Total. Click “Add another item” to add another order item. Click “Remove” to remove an item.
- **Order Total:** This will be automatically calculated based on the item totals from above.
- **Add Accounts:** Use this section to add account(s) to the order. Detailed information below.

  - **Search:** There will be many accounts after they are all added, use this to search for a specific account number. You must type at least 4 numbers for it to make a match.
  - **Accounts:** Click the plus button to see the accounts number for each department. Click the radio button to select which account you are using.
  - **Amount to charge to this account:** If you have only added one account, this will automatically fill with the Order Total. If you add multiple accounts, you will need to manually input the amount you are charging to each account. The amounts must add up to the Order Total (it will notify you if they don’t).
  - **This is the primary account for this order:** Required. You must select a primary account to submit the order, even if you only have one account. This determines which Account Holder will approve the order.
  - **Add another item:** Click this to add another account to the order.
This order will be sent for approval to: This will automatically populate with the email address associated with the primary account for this order.

Pre-approval: Check this box if this order only needs approval from the Account Holder.

Food Order: Check this box if this is a food order. Two fields will appear if checked:

- Attendee List: This is a text area that can be used to paste in an attendee list
- Agenda/Attendee List: This is a file upload that can be used to upload an attendee list and/or agenda.

Grant Funded: Check this box if this order is grant funded.

Business Purpose/Benefit to Project: Required. Use to this text area to provide a short description of the business purpose or a benefit to the project.

Special Instructions: Text area to provide any special instruction needed.

Additional Documents: Upload any files here. There is currently a bug with this where sometimes a document doesn't upload properly. Noted on the webpage.

Click submit.

The submission page will notify you of your submission number. It should look like the image below.
Order History Page

The Order History page is available so you can view all of your past orders. You can see basic order information, the status of the orders, who has approved it, and an edit link for each order. This is not a necessary step in submitting the order, just a useful tool.

1. Login

To view your Order History page, you must be logged in to the CHS website. To do that, click “login” in the top right-hand side of any page on the CHS website.

![Login Image](image)

2. Go To Your Order History Page (Do not log in from Order History page)

Each user has their own URL to view their order history. The URL is as follows: www.uky.edu/chs/order-history/your-linkblue

For example, Meredith’s URL would be www.uky.edu/chs/order-history/mcllove2

Your page should look similar to the image below. It will appear empty if you have not submitted any orders.

![Order History Page Image](image)
**Account Holder Page**

This page is only accessible to those who have permission to approve orders. When someone submits an order to your account, you will receive a notification email from the business office.

1. **Login**
   
   To view your Account Holder page, you must be logged in to the CHS website. To do that, click “login” in the top right-hand side of any page on the CHS website.

   ![Login Image]

   You will know you are logged in when you see a black/gray bar at the top of your screen that has “log out” at the top right-hand side of the page. Once you login, you should stay logged in as long as your browser is open.

2. **Go To Your Account Holder Page**
   
   Each Account Holder has their own URL to view their orders. The URL is as follows:
   www.uky.edu/chs/orders/your-last-name

   A list of Account Holder pages is available from the CHS website main menu:
   *Faculty and Staff >
   *Online Order Forms

   Your page should look similar to the image on the right. It will appear empty if you have no current orders.

   Please note: Please use Chrome or Firefox for these pages.
Account Holder Page

Editing Orders

Edit Fields if Necessary

This page is laid out as a table. Each order is shown horizontally, you can click and drag the bottom scrollbar or click the middle mouse button to scroll horizontally.

Across the top of the table you will see the name of each field from the submission form.

Most of the fields are editable, allowing you to add or remove text from textboxes, click checkboxes, or use dropdowns, etc. This allows you to change the order information if needed. Order Total is not editable as it is calculated from the order items.

Some of the fields require you to show the full field before you can edit. These are shipping information, order item(s), accounts, and additional documents. Click “show/hide..” to show the information.
To add or remove accounts or order items, or edit other fields click the link shown below.

**ORDERS | MEREDITH HOULIHAN**

After making changes scroll to the bottom of the page and click "Save". Once signing your name to approve the order and saving the order will be removed from your queue.

<table>
<thead>
<tr>
<th>Type Your Name: To Approve Order</th>
<th>Edit</th>
<th>Order Reference</th>
<th>Date/Time</th>
<th>Requestor</th>
<th>Existing Vendor</th>
<th>Shipping Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>53</td>
<td>01/23/2018</td>
<td>3:15pm</td>
<td>Will</td>
<td>Amazon</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Harens</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>91</td>
<td>01/23/2018</td>
<td>10:24am</td>
<td>Scott</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

The will allow you not only to add and remove items and accounts, but edit any other field for the order.

**Save The Form (if changes have been made)**

After any edits are made to any of the orders, you must scroll to the bottom of the page and click "Save". Please note, if you click "add/remove items and accounts" or navigate from the page in any way and you have unsaved changes, you will lose those changes.

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**Account Holder Page**

**Flagging Orders**

For your own organization, you may flag orders as "Priority" or "Waiting". This is only for your organization and does not otherwise affect the order in any way.

To flag an order, check one of the checkboxes (seen below) and save the page.

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**ORDERS | MEREDITH HOULIHAN**

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When you flag an order, the color of the field will change to reflect that.
Cancelling Orders

To cancel an order, scroll all the way to the right, check the checkbox, and save.

Request Order Revisions

If an order needs revisions from the requester, you can send a request to them with the click of a button.

1. Type your wanted revisions and save at the bottom of the page.

2. After saving the page, click send revisions. You will receive an email notifying you that your revisions were sent. The requester will receive an email outlining the revisions needed.

Approving Orders

Type your name in the field on the left side of the page and save to approve an order. Once the order is approved it will be removed from your queue.
Feedback

We have been testing for a couple months and have worked out many of the existing bugs. However, we still expect to encounter occasional bugs. If there are bugs you encounter or features you would like added, please report them to:

www.uky.edu/chs/order-form-feedback

Future

We will continue improving the Order Forms over time based on user feedback. If there are ever any questions about the functionality of the Online Order Forms, feel free to email me at wlhi223@uky.edu. Thank you.