CHS SHAREPOINT ORDER SYSTEM
User Guide

1 ..... Access
2 ..... Creating an Order
3 ..... Order Fields
4 ..... Submitting an Order
5 ..... Updating an Order
6 ..... Commenting
ACCESS

1. Navigate to the order form SharePoint site: https://luky.sharepoint.com/sites/cohs/Ordering

2. If you have not previously logged in, you will be prompted to log in with your LinkBlue credentials.

3. After the page has loaded, click “Orders” in the left side bar.
CREATING AN ORDER

1. Click “New” along the top row of options.

2. The order form should look like the image below. You may need to horizontally scroll to view the entire form.
ORDER FIELDS

All fields with asterisks, as well as the business purpose fields, are required.

Utilize the Who, What, When, Where, and Why fields to provide as much information as possible about the order.

Fill in all order item information, including the URL if available. Use the “+” to add another order item.

Select the cost center by scrolling or typing the number, and insert how much of the cost is allocated to this account. Use the “+” to add another cost center.

Additional Fields

If Shipping is marked as yes, additional data fields need to be entered.

If Food Order is marked yes, the location and date of event fields will appear and need to be populated. Attach an agenda and attendee list to the order.

If Vendor is not listed, select Other from the dropdown list. An additional box will appear with other filled in. Delete text in the second box and enter the Vendor information.
SUBMITTING AN ORDER

1. Click “Save” to submit your order.

![Order Form]

2. Once the order is submitted, notification emails will be sent.

   To the person who submitted the order:

   ![Notification Email]

   To the approver of the order:

   ![Power Automate Approval]

   ![Teams Approval]

Outlook  Teams
UPDATING AN ORDER

1. Select your existing order from the list, and click edit.

2. If you cannot find your order, you can filter by "Created by" and select your name.

Click "Save" to update your order.
COMMENTING

Please use the Comment feature to communicate with the financial analyst. Use this feature when you update an order or have a question about your order.