FAQ’S AND TROUBLE SHOOTING

RESEARCH FOUNDATION E-FORMS

Q. Who prepares the e-forms?

A. *The e-form is prepared by the Project Director (PI) or their designee*.

Q. Who approves the e-form?

A. *The Project Director approves all expenditures by signing the e-form. In certain instances the PI may designate another individual to approve certain expenditures or up to a set dollar amount.*

Q. What if I want to give my Research Assistant the authority to sign purchasing e-forms on my behalf?

A. *As Project Director you can delegate authority to an award administrator. You can also set limits to such authority by authorizing your designee to sign up to certain dollar amounts, or by authorizing certain forms such as purchasing but not personnel action forms. Complete and submit the signature authorization e-form available on the Research Foundation Buffalo State website.*

Q. My organization is not on the list of organizations. What should I do?

A. *If you are simply scrolling through the list of organizations, please double check that you did not miss it. If you are typing into the field to search for your organization, make sure to type "160" and a space before typing in your organization's name. If after making sure your organization is not in the list, please contact your grants management specialist so the issue can be resolved.*

Q. Why do all of the department names have a pre-fix of 160?

Oracle Applications are used corporate-wide throughout SUNY – campus 160 is assigned to Buffalo State. Therefore, 160 Biology signifies the Biology Department at Buffalo State. Since the Department is part of the account distribution in the accounting system, it is necessary that the syntax be consistent.

Q. My award number is coming up invalid. What should I do?

A. *Make sure that the award number you typed in is correct. If after double checking you find that your valid award number is still in our system as invalid, contact your grants management specialist so the issue can be resolved.*

Q. What if my award is not on the drop-down list of values for award number?

A. *If your award does not appear on the list of values it can mean one of three things.*

- ✓ *You mistyped the award number. Check the documentation that was sent to you when your award was first established in Oracle Apps. Or query the award number in the PIAI to determine its validity. If the award number you are using is correct, contact your grant management specialist.*
- ✓ *The award number you are trying to use is closed and has been removed from the list of values. You should select an alternate award number or contact your grant management specialist for assistance.*
- ✓ *Your award number is valid but was incorrectly entered into the RF e-forms system. Contact your grants management specialist so the issue can be resolved.*

Q. How do I know which expenditure type to use?

***A*.** *Each award has certain areas where expenditures can be made. Consult the award budget for the breakdown of acceptable expenditure types to determine the correct category for your expenditure. Some awards are limited and cannot spend from every possible category*

Q. What if the expenditure category I need is not on the drop-down list of values?

***A*.** *We were very careful when designing the e-forms system that all possible budget category values were included on the list of values for each e-form. Make sure that you are using the correct e-form that is, make sure that you didn't inadvertently select the stipend e-form, when, in fact, you need to process a direct payment voucher. If you are sure that this is not the case, check the budget breakdown for the award that was sent you when the award was first established in Oracle Apps. This will correlate the line item budget items in your proposal budget with the correct resource values in Oracle. If you are still having trouble, or if you need another copy of your budget breakdown, contact you grant management specialist.*

Q. I don't have special instructions to put on this form.

***A*.** *The special instructions field is not mandatory. If you do not have anything to put in the field you can leave it blank and still submit the form.*

Q. What should the "Notes" page be used for?

A. *The "Notes" page of a form can be used to clarify information on the form. For example, "Please have the vendor contact me with any questions" or "items on backorder until mm/dd/yyyy". Information that is not crucial, but still helpful, is best recorded on the "Notes" page.*

Q. Can I make adjustments to the form after signing it?

A. *No, you are unable to make adjustments or corrections to your form after signing it. If you need to add clarification to the form, you can use the notes page of the form. If there is incorrect data on the form, it will need to be unsigned and sent back to you for corrections.*

Q. How will I know if a form has been signed?

A. *A signed form is noticeable by three characteristics. First, once signed, text in all fields besides the notes page will turn green. Second, no fields -- save for the notes page -- are editable. Tooltips will still pop up in fields, but you cannot change any of the data already present on the form. Finally, in the top right corner of the Formatta window, there will be a small picture of a certification ribbon, letting you know the form has been assigned a digital certificate.*

Q. How can I keep a copy of this e-form?

A. *A copy of the e-form is emailed to the preparer and the authorizer (if different) when the e-form is first submitted and a different stages in the process. Open the e-form and click Check Status for a quick view of where the e-form is in the entire process.*

Q. How will I be notified about the status of my submission?

A. *Once the form has been signed and sent to the Research Foundation for processing, you will begin to receive e-mail updates on the status of your form. If your form requires corrections, you will receive e-mail requests to adjust the form accordingly. If your form requires no corrections during the course of processing, you will not receive e-mails from the Research Foundation until the final steps of processing. If you wish to check the status of your form, you may do so by clicking on the "Check Status" button located in the form (the specific location of the button is form-dependent).*

Q. I haven't received an e-mail confirming my form was submitted?

A. *It could be possible that incorrect contact information was entered into the form for either the preparer or the project director. If you suspect this is the case, you can use the "Check Status" button on the form to see where your form is in workflow. Without proper contact information, though, your form will get stuck at some point in workflow, so make sure to contact us if you have incorrect contact information on your form.*

Q. My e-form has been returned? Do I have to start all over?

A. *No. The form has been unsigned so you can make the necessary changes/edits/or provide attachments. When an e-form has been returned, an explanation is included in the section on the signature page. After edits, re-sign the e-form (or forward to the authorized signer) to re-submit the e-form.*

Q. How do I know why the e-form was returned?

A. *When an e-form has been returned, an explanation of changes corrections or additions is included in the section on the signature page. Make the necessary changes/edits/ attachments and re- sign (or forward to the authorized signer) to re-submit the e-form.*

Q. Why do I have to re-sign the e-form if it is returned for corrections?

A. RF Policy requires that Project Directors approve all disbursements for their respective accounts. System edits will require that you un-sign the e-form in order to make the requested changes. So, you will then need to resign the e-form in order to approve and resubmit the changes.

Q. How can I keep a copy of this e-form?

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Q. Do I have to be on-campus to access the e-forms?

A. *No, as long as you can connect to the internet you can access the RF e-forms from your laptop and submit them the same way you would if you were on campus. The following applications are required, however, in order to use our electronic documents:*

- ✓ *E-formatta Filler - on the windows plate-form*
- ✓ *Adobe (Acrobat) Reader – on any plate-form*

Q. Can I approve an e-e-form from my smart phone?

A. *Currently you cannot access the e-forms from your smart (i.e. Iphone or android) phone – but we are working on it.*

Q. What if I submit the wrong e-form?

A. *We have utilized edits and tool tips within the e-forms system to try to make it as difficult as possible to submit the incorrect e-form. However, if you manage to succeed in sending us the wrong e-form, it will be politely returned to you for corrections - just like when it was a paper form.*

Q. Can e-forms be submitted in paper e-form?

A. *Paper e-forms cannot be accepted. The electronic processing expedites processing/payments, as well as updates the database and electronic filing system.*

Q. Can I submit the e-form electronically but send the attachments in the mail or hand deliver them?

A. *All attachments and supporting documents must be scanned and attached electronically when the e-form is submitted*.

Q. What if I don't have a scanner?

A. Contact Peter Reganti Manager, Information Systems at the Research Foundation ext 6700 or by email

Q. My computer isn't working and I need to submit an e-form, and only electronic submissions are accepted. What should I do?

A. *Contact Computing Services Help desk to trouble shoot the difficulties. In the meantime, there are computers and scanners available in the Research Foundation that you can use.*

Q. How do I get my candy fix now that I am submitting the e-forms electronically?

A. *There are many advantages to our new e-e-forms but certainly one disadvantage from our perspective is that we do not get to see our Project Directors as often. You are still welcome anytime, the candy dish is still there, and it's just not getting filled as often.*

Q. Who do I call if I have a question?

A. ***Carol Julian, Manager****, Accounts Payable/ Purchasing and* ***Sherrie Manka****, Accounts Payable/ Purchasing Associate are available at x 4144 or by email to answer questions related to which e-form to use what type of documentation is needed and e-form content questions.*

Peter Reganti*, Manager, Information Systems is available at x6700 or by email to answer technical questions.*