



Navigating the E-forms

- **Select** the E-form from the RF website E-forms page, the link <https://sponsoredprograms.buffalostate.edu/procurement-forms>

- To **move** to another field:
 - Press the tab key OR
 - Use the mouse to point and select the field

- **Tool Tips** are provided to further explain the type of information that should be entered in a certain field. It also indicates the proper format in which to enter data (i.e. no punctuation, mm/dd/yyyy).

To view a tool tip roll the cursor over the field, it will pop up.

To close the box, click on the X at the top right or tab to another field.

The screenshot shows a web form titled "Contractor Information:". The form includes fields for "Legal Name:", "Permanent Address", "State:" (with "NEW YORK" selected), "Local Address", "State:", "Phone:", and "Citizenship Status" (with radio buttons for "US Citizen", "Resident Alien", and "Non Resident"). A "Tool Tip" box is overlaid on the "Legal Name:" field. The tool tip contains the following text: "Please enter the Contractor's legal name.", "Businesses: Full legal business name - NO punctuation or abbreviations.", "Example: Acme Office Supply Incorporated", "Individuals: Name as it appears on a driver's license or passport - NO punctuation, using the format 'First Name, Middle Initial, Last Name'.", "Example: Charles A Smith". An orange arrow labeled "Tool Tip" points to the box. A small 'X' icon is visible in the top right corner of the tool tip box.



- **Drop Down Arrow/Menu** in a field indicates to choose from a pre-defined list of values. (i.e. in the Expenditure type and Organization fields). Click on the down arrow to view the list, select the appropriate entry.

Expenditure Type

EQP - Equipment

- EQP - Equipment
- FPS - Participant Depen Allowance
- FPS - Participant Support
- FPS - Participant Travel
- GNS - General
- LSE - Leases Oth Equipment
- LSB - Real Prop Base Rent
- OTR - Miscellaneous Other
- SUP - Other Supplies
- TRV - Domestic Travel
- TRV - Foreign Travel
- TUI - SUNY Tuition and Fees

- **Radio button** lists also indicate to choose from pre-defined values. Only one box or circle can be selected at a time. A previous selection will be unselected when a new item is selected.

Corporation

Other

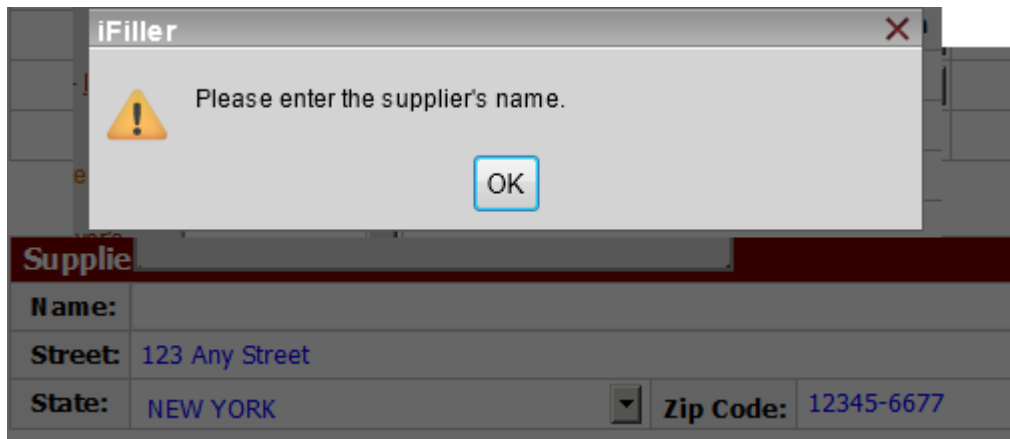
- **Type** in upper and lower case, avoid all caps. No punctuation.



- **Required Fields** - certain fields are required to be filled (i.e. legal name, permanent and local addresses, telephone numbers, identification numbers).

Submission will not be completed if a required field is left blank. The system will prompt with an information dialog box, describing the information needed.

In this sample below, the dialog box indicates that the supplier's name



If multiple, required fields are blank, a dialog box for each field will display, one a time. Complete the entry then try to submit the form again.