



Following is helpful information on electronic forms presented in a question and answer format.



**Why do I sometimes get a “loading” icon when filling out a form?**

Sometimes when you submit or approve a form, the processing will take longer than at other times. You will then see a loading icon. Do not click again, don't close the window, wait until it stops processing.

**What is the difference between initiate, approve, transfer?**

**Initiate**

refers to starting a form. For example, a person in a department starts a PARF, completing the basic information and sends it to the next person in the workflow.

**Approve**

refers to accepting the form at any given step in the process, which could include final approval. Only people with the administrative authority can give an approval.

**Transfer**

refers to sending a form to someone within the workflow *without approving it*. For example, a form is sent to an ADA, who needs to add information to the form and then send it for approval. The ADA would *transfer* the form because he/she does not have authority to approve it.

**What is the difference between return to initiator and reject?**

**Return to initiator**

means that the person who started the form needs to add or change information on the form. So, the person who is in receipt of the form will click *Return to initiator*.

**Rejecting the form**

means that the person does not approve the form. This typically ends the workflow.

**How can I update my Task List if I know I have received a new task?**

On the home BP Logix screen, in the *Task Lists* section, click **REFRESH** 

If that doesn't do it, log out and log back in.


**How do I search for a form to see where it currently is?**

1. On the home BP Logix screen, in the *Running Workflows* section, click on the form you are interested in  
A routing slip will be displayed with the names of the people the form has been to. The last name in the list is where the form currently is.  
If the status column says "Active" that is where the form is.

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## How do I use the “. . .” button ?

Use this button to assign the form to the person you will be sending it to.

1. Click   
A searchable menu of all users appears.
2. Type the last name of the user you are looking for
3. Click **GO**  
A list of names appears.
4. Select the name of the person you want to assign the form to
5. Click **OK**  
The name appears in the *Select the person after you in the Routing order* text box
6. Click **SEND**  
The form is sent.

## What happens if I forget to assign the form to another person using the button?

If you click SEND without assigning the form to someone, the form is sent to the office responsible for the form (e.g., a PARF would be sent to the Human Resources office). That office is able to send it to the next responsible person if necessary.

## When should I print the form?

Because these are electronic forms saved in a database, there should be no need to print them. You will have access to them on the server.

However, if you do need to print a form, print it at the end of the workflow, when aPDF copy is sent to you via an email attachment. In this way, the form will be complete and the layout will be more printer friendly.

## How do I make suggestions for changes to a form?

1. From the BP Logix home page, in the bottom left corner, from the pull-down list, select **LTS**
2. Click **CHANGE REQUEST FORM**
3. Complete the form
4. Click **SUBMIT**  
The request will go before a change control board for consideration.

## Who do I call if I have questions about the form I'm completing?

Call the main contact in the responsible for the form. For example, for questions on a PARF, you call Human Resources.