# Frequently Asked Questions for Variance Analysis Form
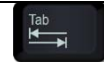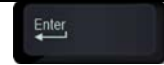
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# 1 Which internet browsers are compatible with the variance analysis form?

MachForm supports Internet Exploer (IE), Mozilla Firefox, Safari and Chrome.

# 2 What are the shortcut keys?

| | |
|---|---|
| Tab | Moves curser to next field on the form. |
| Enter | Goes to next page |

# 3 What can I do to avoid losing data?

- Do not use the back button on your browser. This may delete all previously entered data.

  Use the navigation buttons at the bottom of the form to go to the previous screen.

- Enter your email address in the "Enter Your Email Address" field that appears after checking the box to "Save my progress and resume later". This will ensure that you receive a copy of the resume later link by email.

  This field only accepts one email address but you can forward the link to multiple users after receiving the resume link email. **Note:** only <u>one</u> user can be accessing the resume link at one time.

- If you have not entered your email address after checking off "Save my progress and resume later", but clicked on Save form and resume later. Please make sure to copy down the link which appears on the screen.

# 4 How do I know that Financial Reporting has received the completed forms?

Financial Reporting will only receive the completed forms when the forms are submitted and users are taken to the success page. A confirmation email will be sent to the preparer and the approver's email addresses.

> Success! Your submission has been saved!
>
> To complete another form please click on the web link below.
> http://finrept.apps01.yorku.ca/machform/view.php?id=18700

# 5 How can I get a copy of the submission?

Once submitted, a confirmation email with data entered will be sent to the preparer and the approvers' email address.

# 6 How long does it take to receive the confirmation email or the resume link?

Submission confirmation or Save and Resume emails are usually sent within 10 minutes, if you do not see the email in your inbox, please check under Junk mail.

To remove the email address from the Junk list, right click on the email in junk folder, and select "Remove sender from Junk list".

# 7 Can I make changes to the form after it's been submitted?

Once the form is submitted, users can no longer edit the form data. If you wish to correct your submission please contact Financial Reporting to reopen the form.

# 8 Getting Approval for Form Submission?

For forms requiring approval prior to submission, this can be done in two ways.

## 8.1 Option 1: Approver to review form on MachForm and submits final version

1. Fill out the form with all necessary information
2. Click the save and resume checkbox, enter your email address to save the progress.
3. Forward the email with the resume link to the approver.
   - *Include any attachments you want the approver to review as within the email
   - *If you have more than one approver, send to one approver at a time. Attain the first approver's confirmation email before sending the saved link to the second approver
4. The Approver can click on resume link in email to access the completed form to review the data and make any changes as necessary.
5. Once information is finalized Approver can submit the form.

## 8.2  Option 2: Approver to review printout of the completed form

1. Fill out the form with all necessary information and print out the form
2. Check off save and resume, enter your email address to save the progress
3. Submit paper form to approver for review and signature
4. Access completed form from the resume link in the email.
5. Scan and attach the signed form under Attachments/Backup, then submit form.

# 9  Having an assistant to fill out part of the form for a large group*?*

1. An assistant fills out the form with basic information such as account, cost centre, preparer and/or approver fields.
2. Click the save and resume checkbox, enter email address to save the progress.
3. Send the resume link to next preparer
   a. **Option 1:** Forward the email with the resume link to the next user. For differentiation between emails, the assistant can add in the account-cost centre combination in email heading.



   b. **Option 2:** Create an table in excel or word document with Account, cost centre and hyperlink which can be sent to the preparers and/or approvers.

| Account | Cost centre | Next User | Hyperlink for Partially Completed Form |
|---------|-------------|-----------|----------------------------------------|
| 482100 | 222222 | UserB | http://finrept.apps01.yorku.ca/machform/view.php?id=18700&mf_resume=11dd594b8c |
| 004600 | 222222 | UserB | http://finrept.apps01. yorku.ca/machform/view.php?id=18700&mf_resume=5344f_4a3a5 |

   ⚠️ **New for 2016!** – Passport York login has been added for extra security. In order to use to the hyperlinks, please print excel or word file to Adobe PDF, or copy and paste the table to Notepad. Clicking on the hyperlink within Microsoft Office applications will take users to Passport York login error page.



4. The preparer can click on resume link to complete the remainder of the form and submit or send to approver for review.
5. Once information is finalized, last user can submit the form.

## 10 Submitting multiple forms with repetitive information?

For users submitting multiple forms with repetitive information, use of the autofill function in your internet browser will help to minimize the amount of data entry for repeating fields such as preparer and approver information.

### 10.1 Enabling Autofill Function in Internet Brower

| Mozilla Firefox (enabled by default) | https://support.mozilla.org/en-US/kb/control-whether-firefox-automatically-fills-forms |
|---|---|
| Internet Explorer | http://windows.microsoft.com/en-ca/internet-explorer/fill-in-forms-remember-passwords-autocomplete#ie=ie-10-win-7 |
| Google Chrome (enabled by default) | https://support.google.com/chrome/answer/142893?hl=en |
| Safari | https://support.apple.com/kb/PH17178?locale=en_US |

### 10.2 Using the Autofill function

1.  Type the first few letters of the beginning entry/or double click in the form field.
2.  A dropdown menu will pop up showing what you typed into a similar form previously.
3.  Press the down arrow key to select the entry you want to use again.
4.  Press Enter with the correct entry highlighted, or use the mouse to click on the entry.