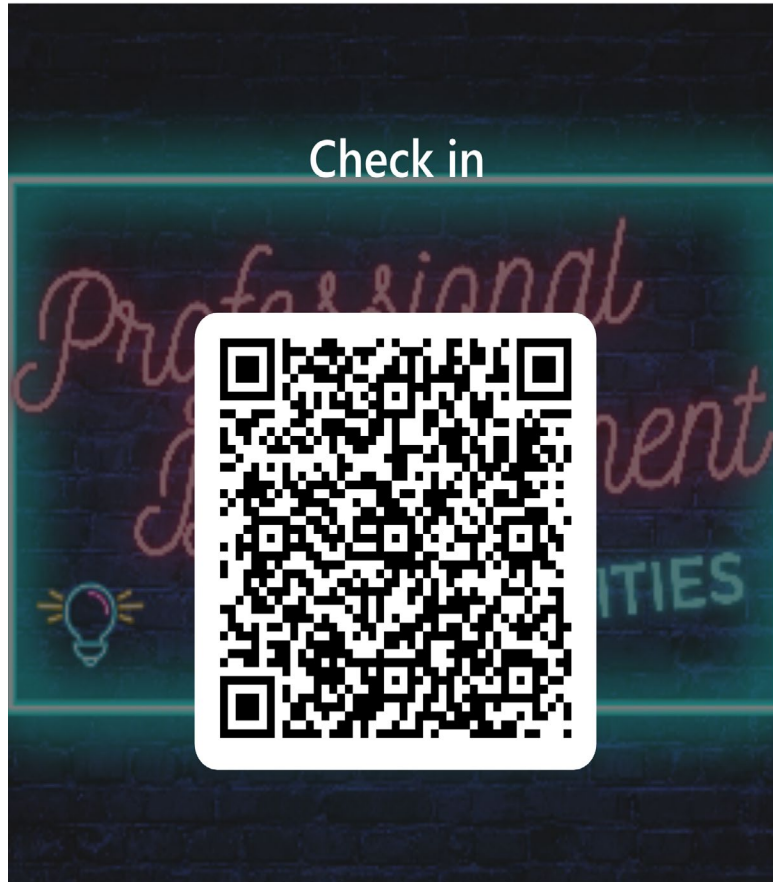


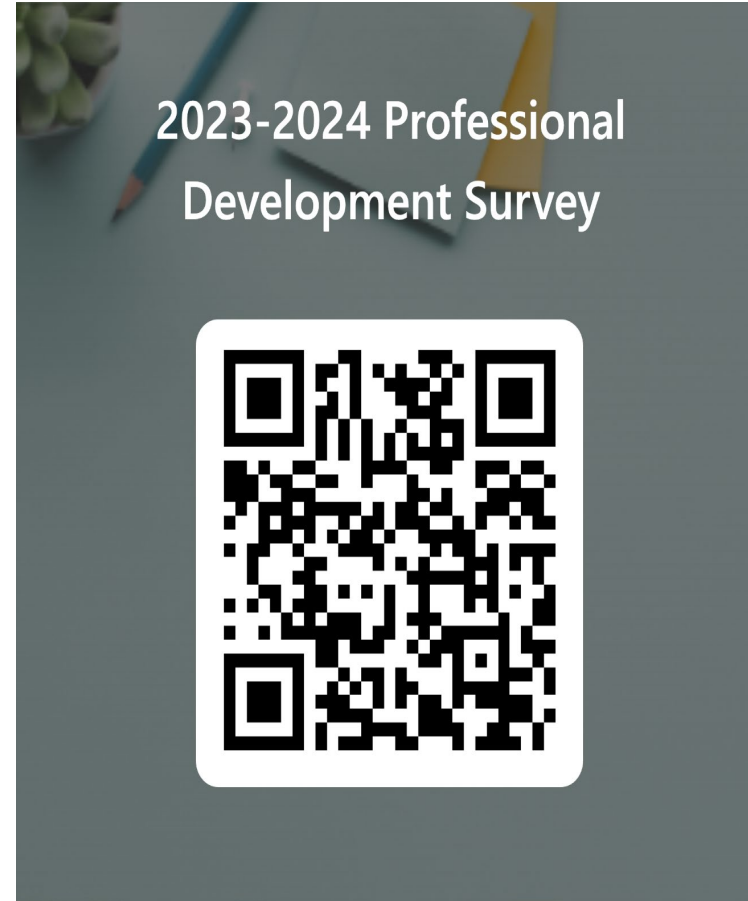


Self-Service Procurement

Please sign in to Self-Service



Check in: <https://forms.office.com/r/LC7DPNXaKN>



Survey: <https://forms.office.com/r/ZQYHs1mzSS>



1. Click on Procurement in the Financial Management Screen

Self-Service

[Daily Work](#) · [Financial Management](#) · Financial Management Overview

Financial Management Overview

Financial Information



Approve Documents

Here you can approve a list of financial documents.



Budget to Actuals

Here you can view the financial health of your cost centers.



Procurement

Here you can create and maintain your procurement documents.



W Self-Service

Daily Work Home Financial Management Procurement

Procurement

Financial Information

View Create

Filter

Document Types: Requisition, ,

Requisition

No Requisitions to view.

Purchase Order

No Purchase Orders to view.

Payment Request

No Payment Requests to view.

2. Select Create



View

Create

Document Type *

Requisition



Requisition Date *

10/2/2023



Initiator

Initiator Lookup



Adriana L. Perez X

Confirmation Email Address *

adriana.perez@azwestern.edu

Add email addresses separated by commas

Ship To *

01 Arizona Western College



Desired Date

10/16/2023



Vendor ID

Vendor Lookup



3. Enter Vendor ID

AP Type

0001 Accounts Payable





Approvers	Approval Date
-----------	---------------

Next Approvers

Printed Comments

Internal Comments

4. Printed Comments

- Quote#
- Vendor Contact Info
- Brief Description
- Omni Clause if Applicable

5. Internal Comments

- Indicate if Doc is a BPO
- What to do w/ the BPO/PO upon execution



6. Enter Tax, Description, Quantity, and Price

Tax Code 1: 01 Yuma Sales Tax 8.412%
Tax Code 2: None
Tax Code 3: None

Items

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price
------------	-------------	-------------	----------	------	-------	----------------

New Item

Description *
Vendor Part

Description is a required field.

Quantity *
Unit: None
Price
Extended Price: \$0.00

GL Account *
Project: None

GL account is required.

Quantity: 0.000
Percent: 100.000
Amount: 0.00
GL Remaining Balance



7. Enter GL Line(s) then select add item.

New Item

Description *

Vendor Part

Quantity *

Unit

Price *

Price is a required field.

Extended Price

GL Account *

10-0000-31510-5210 PURCHASING/PROPERTY CONTROL : OPERATIONAL SERVICES

Project

Quantity *

Percent *

Amount *

GL Remaining Balance

\$2,168.69

Add GL Account

Additional Details

Cancel

Add Item

Reuse GL Accounts

Cancel

Save



8. After adding line item(s), select save & attach.

New Item

Description * Vendor Part

Description is a required field.

Quantity * Unit Price * Extended Price

Price is a required field.

GL Account * Project

10-0000-31510-5210 PURCHASING/PROPERTY CONTROL : OPERATIONAL SERVICES

Quantity * Percent * Amount * GL Remaining Balance

Add GL Account

Cancel

Add Item

Cancel

Save and Attach



9. Choose file and select upload.
(Attachment required to submit)

Attachments

Upload new attachment

Choose File No file chosen Upload Clear

Accepted File Types: (.pdf,.jpg,.png,.gif,.bmp,.bm,.tif,.tiff)

Maximum File Size: (20 MB)

No attachments found.

Close

***Requisition completed after uploading file, approval email sent to approver. ***

Side Note



The screenshot shows a software interface with a 'Filter' button at the top left. Below it, there are two filter tags: 'Document Types: Requisition' and 'Statuses: In Progress, Outst...'. The 'Filter' menu is open, showing several categories: 'Document Type' (with 'Requisition' selected), 'Vendor', 'Amount', 'Date Range', and 'Status'. The 'Status' category is circled in red. Below 'Status', there is a list of status options with checkboxes:

Status	Checked
Select All	<input type="checkbox"/>
In Progress	<input checked="" type="checkbox"/>
Outstanding	<input checked="" type="checkbox"/>
Not Approved	<input checked="" type="checkbox"/>
PO Created	<input type="checkbox"/>
Accepted	<input type="checkbox"/>
Backordered	<input type="checkbox"/>
Invoiced/Paid/Reconciled	<input type="checkbox"/>
Voided/Closed	<input type="checkbox"/>

Under Filter open Status and make sure “In Progress”, “Outstanding” and “Not Approved” are selected if you are unable to see the req you just created



Confirm the added req is in **not approved** category

Additional approvers

The screenshot shows a web interface for managing requisitions. On the left, there are filter panels for 'Document Type' (set to 'Requisition'), 'Vendor', 'Amount', and 'Date Range'. The main area displays a table of requisitions. The table has columns for 'Requisition Date', 'Requisition' (including ID and description), 'Total', and 'Approvers/Next Approvers'. One row for requisition 0084630 is circled in red, and a red arrow points from the text 'Additional approvers' to the '+1' icon next to the approver name 'Ashley B Herrington'.

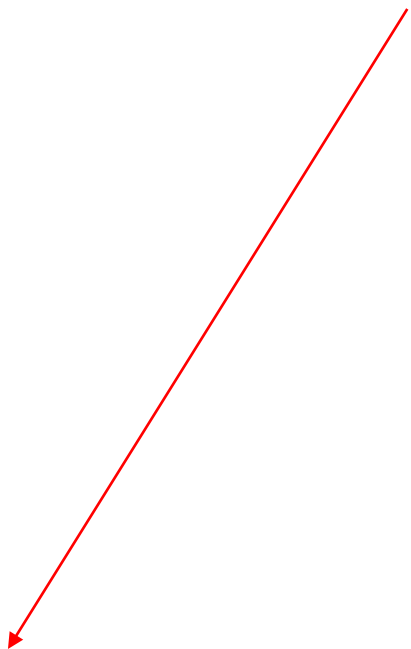
Requisition Date	Requisition	Total	Approvers/Next Approvers
8/7/2023	0084777 In Progress 0103766 B & H Photo & Electronics Corp	\$396,000.00	Ross Poppenberger
2/15/2023	0084630 In Progress 0370958 Zoom Video Communications Inc	\$22,074.00	Ashley B Herrington +1
9/6/2023	0084786 Not Approved 0125528 Home Depot	\$162.62	Brenda Sawyer
8/7/2023	0084778 Not Approved 0222241 CDROM2GO.COM	\$1,626.18	Ross Poppenberger

*Any changes to the requisition after it is approved will erase the approvals



Screen shows requisition status.

- In Progress
- Not Approved
- Outstanding
- PO Created



9/6/2023	<u>0084786</u>	Outstanding	0125528 Home Depot		\$162.62		Brenda Sawyer
7/10/2023	0084742		0120455 A & S Electronic and Computer		\$50,000.00		



Requisition Attachments

- Quote(s)
- Agreement / Contract
- Vendor Service Proposal*
- Sponsor Services Contract*

New Vendor Onboarding

- W9 Form
- ACH Form
- COI Approved by Risk Management*

*1 Month prior to services being rendered

Sample email sent to approver



From: purchasing@azwestern.edu <purchasing@azwestern.edu>
Sent: Wednesday, September 06, 2023 4:12 PM
To: Tim Hauser <Timothy.Hauser@azwestern.edu>
Subject: Requisition Confirmation

Requisition Number 0084786
Requisition Total \$162.62
Vendor ID and/or Name 0125528 Home Depot

Requisition Status Not Approved
AP Type 0001 Accounts Payable
Requisition Date 09/06/23
Status Date 09/06/23
Maintenance Date 09/06/23
Desired Date 09/20/23
Requestor Name Mr. Timothy L. Hauser
Initiator Name Mr. Timothy L. Hauser
Ship to 01 Arizona Western College
Commodity Code

Item 1
Item Description TEST#
Vendor Item
Quantity 1.00
Unit of Issue EA Each
Price 162.62
Extended Price 162.62
GL Distribution 10-0000-31510-5210
Project ID
Tax Codes 01

Desired Date 08/08/23
Fixed Asset
Tax Info
Item Comments

Printed Comments

Comments	Date
Approval	

Next Approval
BMR1

Approving Requisitions



1. Select Approve Documents

The screenshot shows a web browser window with the URL <https://colss-prod.ec.azwestern.edu/Student/ColleagueFinance>. The page title is "Financial Management Overview". The main content area is titled "Financial Management Overview" and contains three tiles:

- Approve Documents**: Here you can approve a list of financial documents. This tile is circled in red, and a red arrow points to it from the instruction "1. Select Approve Documents".
- Budget to Actuals**: Here you can view the financial health of your cost centers.
- Procurement**: Here you can create and maintain your procurement documents.

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Approving Requisitions



2. Select requisition(s)

The screenshot shows the 'Self-Service' interface for 'Approve Documents'. The 'Requisitions' section contains a table with the following data:

Approve Return	Next Approver	Requisition / Date / Vendor	Approvers / Next Approvers	Total	Override Budget?
<input type="checkbox"/>	Next Approver Lookup	0085434 9/21/2023 B & H Photo & Electronics Corp	Brenda Sawyer	\$108.41	<input type="checkbox"/>

Below the requisitions table, there are three sections: 'Purchase Orders', 'Vouchers', and 'Journal Entries', each with a message indicating that there are no items requiring approval.

At the bottom right, there is a 'Submit' button.

Approving Requisitions



3. View requisitions details and attachments

Requisition Details ✕

0084783

Overview **Approvers** Line Items

Status	Not Approved
Vendor	0000416 ODP Business Solutions
Amount	\$1,084.12
Maintenance Date	8/14/2023
Initiator	Adriana L. Perez
Requestor	Adriana L. Perez
Attachments	View 1

Additional Details ▾

Printed Comments

Internal Comments

Self-Service

Daily Work · Financial Management · Approve Documents

Requisition 0084783

Status	Not Approved	Date	8/14/2023
Vendor	0000416 ODP Business Solutions	Status Date	8/14/2023
Amount	\$1,084.12	Desired Date	8/28/2023
Maintenance Date	8/14/2023	AP Type	0001 Accounts Payable
Initiator	Adriana L. Perez		
Requestor	Adriana L. Perez		

Associated Documents

Attachments [View 1](#)

Printed Comments

Internal Comments

Line Items	Description	Quantity	Unit	Price	Extended Price
1	test Purchasing	1	EA	\$1,000.0000	\$1,000.00

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Attachments ✕

Name	Uploaded On	Actions
Doc2.pdf	8/14/2023 02:15:32 PM	Download

Close

Approving Requisitions



5. After selecting requisition, hit submit.

The screenshot shows a web browser window with the URL <https://colss-prod.ec.azwestern.edu/Student/ColleagueFinance/ApproveDocuments>. The page title is "Approve Documents" and the user is logged in as "bmr1". The main content area is titled "Requisitions" and contains a table with the following data:

Approve/Return	Next Approver	Requisition / Date / Vendor	Approvers / Next Approvers	Total	Override Budget?
<input checked="" type="checkbox"/>	Next Approver Lookup	0085434 9/21/2023 B & H Photo & Electronics Corp	Brenda Sawyer	\$108.41	<input type="checkbox"/>

Below the table, there are three sections: "Purchase Orders", "Vouchers", and "Journal Entries", each with a message: "There are no [type] that require your approval." At the bottom right of the page, a blue "Submit" button is circled in red, with a red arrow pointing to it from the instruction text above.

Approving Requisitions



6. Approval confirmation

The screenshot shows the 'Self-Service' interface. The breadcrumb trail is 'Daily Work > Financial Management > Approve Documents'. The page title is 'Approve Documents' with a 'Back to List' link. There are two tabs: 'Approve' (active) and 'History'. The 'Approval Confirmation' section is circled in red, with a red arrow pointing to it from the text '6. Approval confirmation'. Below this, there are two sections: 'The following documents were updated or created.' and 'The following documents were not updated.' Each section contains a table with columns for 'Document Type', 'Document', and 'Message'.

Document Type	Document	Message
Requisition	0085434	No additional approvals are required.

Document Type	Document	Message

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Approving Requisitions



Historical Information

Purchase Orders

Purchase Order	Approvers
P0068786 6/29/2023 Not Approved A & B Sporting	Brenda Sawyer 6/29/2023
P0068785 6/1/2023 Not Approved ODP Business Solutions	Brenda Sawyer 6/1/2023
P0068784 5/31/2023 Not Approved Staples Inc dba	Brenda Sawyer 5/31/2023
P0068783 5/25/2023 Not Approved Contract Paper Group Inc	Brenda Sawyer 5/25/2023
P0068782 5/25/2023 Not Approved CDW LLC	Brenda Sawyer 5/25/2023
P0068781 5/25/2023 Not Approved Lowe's Home Improvement	Brenda Sawyer 5/25/2023
P0068594 10/27/2022 Reconciled U S Bank National Association dba	Brenda Sawyer 10/27/2022

Vouchers

Voucher	Approvers
V0576569 11/9/2022 Reconciled U S Bank National Association dba	Brenda Sawyer 11/9/2022



IT'S A GREAT DAY TO BE A MATADOR!

