



Self-Service Procurement

Self-Service



Procurement

### **Requisitions**

- View, create, modify and delete requisitions
- Add as many line items as you need and multiple GL account numbers
- Confirmation emails are sent to the requestor
- Automatic approvals routing
- Emails requesting approval are sent as required
- Document attachments are required
- Approval returns
- Filter documents by status, vendor, amount, date range and type

# Self-Service



# Procurement

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### Procurement

View | Create

Filter | Collapse All

Document Types: Requisition, Purchase Order, Payment Request

#### Requisition

| Requisition Date | Requisition   | Total       | Approvers/Next Approvers |
|------------------|---|-------------|--------------------------|
| 11/7/2022        | <a href="#">0000382</a> <span>Returned</span> 1000113 Fastenal                            | \$3,000.00  |                          |
| 10/14/2021       | <a href="#">0000118</a> <span>In Progress</span> 1000282 CDW                              | \$25,000.00 | Yaki Ingram              |
| 2/21/2023        | <a href="#">0000802</a> <span>Not Approved</span> 1001014 Hobby Lobby                     | \$300.00    | Dru Strickland           |
| 2/21/2023        | <a href="#">0000124</a> <span>Not Approved</span> 1009113 Fastenal                        | \$1,000.00  |                          |
| 11/28/2022       | <a href="#">0000389</a> <span>Not Approved</span> 1000282 CDW                             | \$500.00    |                          |
| 9/21/2022        | <a href="#">0000372</a> <span>Not Approved</span> 1000106 Home Depot Inc., Dba Home Depot | \$200.00    |                          |

# Self-Service Procurement



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### Procurement

View **Create**

|                 |  |                              |   |
|-----------------|--|------------------------------|---|
| Document Type * | Requisition  | Requisition Date *           | 2/24/2023   |
| Initiator       | Initiator Lookup<br><small>Stacey S. Beckner X</small> | Confirmation Email Address * | stacey.beckner@ellucian.com<br><small>Add email addresses separated by commas</small> |
| Ship To *       | 01 University of Colleague                             |                              |   |
| Vendor ID       | Vendor Lookup  |                              |   |
| AP Type         | AP Regular Vendor Payments                             |                              |   |
| Tax Code 1      |  | Tax Code 2                   |   |

| Approvers            | Approval Date |
|----------------------|---------------|
| Next Approver        |               |
| Next Approver Lookup |               |
| Printed Comments     |               |
| Internal Comments    |               |

Self-Service



Approval

### **Approve Documents**

- View a list of pending approvals
- View previously approved requisitions
- View approvers and next approvers
- Email requestor when a document is approved

# Self-Service



# Approval

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### Approve Documents

Approve History

#### Requisitions

| Approve/Return           | Next Approver                        | Requisition / Date / Vendor                                      | Approvers / Next Approvers          | Total      | Override Budget?         |
|--------------------------|--------------------------------------|--|-------------------------------------|------------|--------------------------|
| <input type="checkbox"/> | <a href="#">Next Approver Lookup</a> | <a href="#">0000349</a> 5/13/2022<br>Jed's Lab Coat Supply, Inc. | Cathy Daniels (+1)                  | \$1,250.00 | <input type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Next Approver Lookup</a> | <a href="#">0000348</a> 5/13/2022<br>Jed's Lab Coat Supply, Inc. | Cathy Daniels (+1)                  | \$1,250.00 | <input type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Next Approver Lookup</a> | <a href="#">0000328</a> 3/3/2022<br>Amazon.com, Inc.             | Dirie Strindand  Cathy Daniels (+1) | \$375.00   | <input type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Next Approver Lookup</a> | <a href="#">0000218</a> 2/7/2022<br>Staples Store #456           | Jodi Millin (+1)  Vikki Ingram (+1) | \$5.00     | <input type="checkbox"/> |
| <input type="checkbox"/> | <a href="#">Next Approver Lookup</a> | <a href="#">0000173</a> 2/1/2022<br>Staples Store #456           | Jodi Millin (+1)  Vikki Ingram (+1) | \$40.00    | <input type="checkbox"/> |

# Self-Service



# Procurement

## **WHY Colleague Procurement Self-Service?**

- Easy requisition creation is efficient for all users
- Lookup GL account numbers by description , enabling end users, no need to remember GL account numbers
- End Users can see all items they ordered, keeping them informed of the status of their orders
- Innovative solution specifically designed for higher education.



## Purchasing Team

Points of Contact:

AWC Purchasing [Purchasing@azwestern.edu](mailto:Purchasing@azwestern.edu)

- Brenda Sawyer, Purchasing Director
- Adriana Perez, Projects & CIP
- Stacey Lopez, PO's
- Uriel Pacheco, BPO & Tech Purchases
- Tim Hauser, P-Cards

