

Online Requisitions

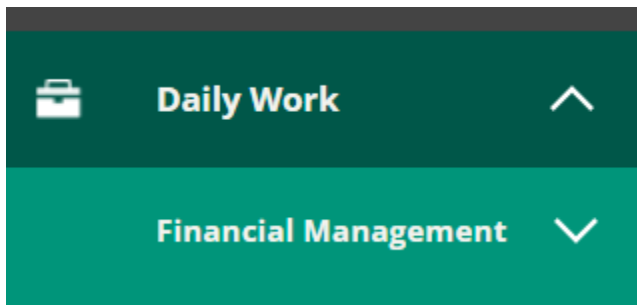
Initiator Training Guide

In an effort to improve processing efficiencies, the College will begin utilizing Ellucian Self-Service Procurement to process Requisitions online. This process will be used for all General Fund purchases of goods and services. This online process will also be used for certain recurring non-General Fund programs and grants. These include Workforce Strategies, Criminal Justice Training, Possible Dream Program, Athletics, Foundation, Public Media and the Motorcycle Training and Perkins grants. All others will continue to use the existing paper requisition process.

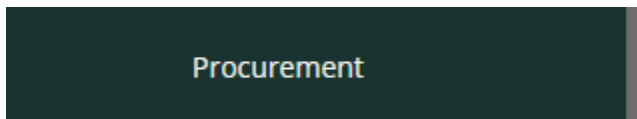
Roles have been defined in the system for the College's various offices, divisions, programs, etc. Each of these roles has specific General Ledger accounts assigned, as well as individuals who are authorized to initiate (originate) and approve a requisition on behalf of the particular office/division/program. Once submitted, the Requisition will route automatically based on an approval hierarchy that has been defined in the system.

Below is a step-by-step guide for assigned Initiators to enter an online requisition.

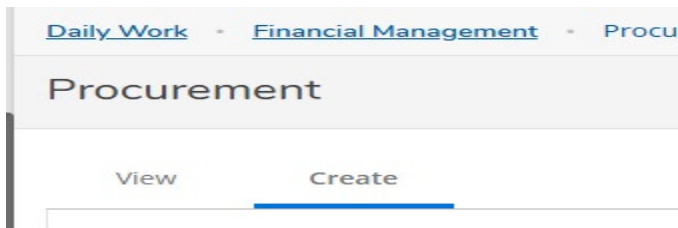
1. Begin by logging into Employee Self-Service.
2. Click on the Daily Work Briefcase symbol on the far left of the Self-Service screen, and then click on the Financial Management down arrow.



3. Click on Procurement, near the bottom in the list of options.




4. On the top of the Procurement screen, select "Create". The View option provides status updates on Requisitions during the approval process.



Note - all Required fields to create a requisition are denoted by an asterisk “”.*

5. Document Type – Click the Dropdown arrow and select “Requisition”

Document Type *

Requisition 

6. Requisition Date – This will default to the date that you are entering the requisition, or it can be changed to a future date, if appropriate.

Requisition Date *

9/3/2025 

7. Initiator - This will default to the person entering the Requisition.

Initiator

Initiator Lookup 

Angela J. Cramer 

8. Confirmation Email Address – This will default to the email of the person submitting the requisition. If you are entering the requisition for someone else, you can also enter their email address in this field. Multiple email addresses must be separated by commas, as in the example below.

Confirmation Email Address *

ajcramer@delta.edu, jonathanfoco@delta.edu

Add email addresses separated by commas


9. Desired Date – This will default to two weeks from the request date, or a later date may be entered.

Desired Date

9/17/2025 

10. Ship To – This will default to Delta College since we have centralized shipping and receiving on Main Campus.

Ship To *

DC Delta College 

11. Vendor ID – Begin entering the name of the Vendor that the purchase will be made from and a list of matching vendors will populate to select from, click on the appropriate vendor. If you know the vendor ID from past purchases, you can also enter the ID # versus the vendor’s name.

Vendor ID

laser

Laser Connection LLC 1192158
P.O. Box 46 Auburn MI 48611
(BU-Business)

Laser Striping LLC 1546925
9965 Lapham Way Plymouth MI 48170
(BU-Business)

If you are using a new vendor that is not in the system, before you go any further in the Requisition process, you must reach out to Business Services to request to have the new vendor added. Business Services contact information is as follows:

Business Services

B116

businessservices@delta.edu

989-686-9233

12. AP Type – Select the appropriate AP Type from the dropdown menu, the options include:

AP Type

R REG. VENDOR PAYABLES

- R REG VENDOR PAYABLES (use this selection for all purchases that do not fall into one of the other categories listed below)
- MW MI WORKS PAYABLE (used only by Workforce Strategies for Michigan Works grant payments)
- BLANKET PO (amount must fall within the cost center line-item budget and the time period can cover no more than one year). Recurring Blanket Pos must be re-entered annually.
- BOOKSTORE A/P (used only for Bookstore purchases)

- PNC CREDIT CARD PURCHASE – If you are entering a requisition that has been historically paid with the College credit card, you can use this selection. If unsure whether the Business Office will be making payment by check or credit card, select the REG VENDOR PAYABLES option. If the Business Office decides to use the College credit card for payment, they will change the AP Type to PNC CREDIT CARD when they convert the requisition to a Purchase Order.

13. Next Approvers – **Leave Blank** It is not necessary to enter an approver name in this field since an approval hierarchy has been populated in the system during creation of the General Ledger roles.

| Approvers | Approval Date |
|---|---------------|
| <p>Next Approvers</p> <p><i>Next Approver Lookup</i></p> | |

14. Printed & Internal Comments – Printed Comments will appear on the face of the PO. Enter any additional helpful comments for internal staff in the internal comments section, such as email addresses or website links, or instructions for the Business Office.

Printed Comments

Email completed PO to Joe.Smith@laserconnection.com

Internal Comments

This toner cartridge is for the Cashier's Office

15. Items – Click the Add Item button to enter detail for the Item(s) being purchased.

Items

| Line Items | Descr |
|-----------------|-------|
| <p>Add Item</p> | |

16. Description & Vendor Part – Enter a description of the product or service being purchased. Please note, purchases of \$10,000 or more and purchases under certain grants require competitive bidding. Please reach out to Business Services to discuss required procedures before proceeding any further if these circumstances are applicable to your purchase. The Vendor Part number is not a required field but is helpful if the information is available.

| | |
|---|-------------------------------------|
| Description * | Vendor Part |
| <input type="text" value="Toner cartridge for Konika Minolta X4500"/> | <input type="text" value="XYZ123"/> |

Please note that if you are purchasing an item that will be attached to a wall, furniture, or appliances, you must first reach out to Ed Andres, ejandres@delta.edu, in the Facilities Department to obtain approval . A copy of an approval email should be uploaded as an attachment when the requisition is submitted.

17. Quantity, Unit & Price – Enter the quantity of items being purchased and the price per unit. Select “Each” for the units. The system will calculate the total purchase amount.

| | | | |
|--------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|
| Quantity * | Unit | Price | Extended Price |
| <input type="text" value="2"/> | <input type="text" value="EA EACH"/> | <input type="text" value="250.0000"/> | <input type="text" value="\$500.00"/> |

18. GL Account – Enter the complete 10 digit account number that the purchase will be charged to (Fund XX-Cost Center XXXX-Object XXXX). As you begin to type the account number, a list of available account numbers will populate to select from, click on the appropriate account number from the list, or type in the full account number if you are familiar with it. Only those account numbers that have been assigned to the requisition originator’s role will populate. Instead of an account number, you can also begin to type a description of the expense such as “Office Supplies” and the system will bring up a list of general ledger account numbers meeting that description. In the example below, the expense is being split between two different cost centers by entering the percentage to be charged to each account number entered.

| | | |
|---|--------------------------------------|---------------------------------------|
| Quantity * | Unit | Price * |
| <input type="text" value="2"/> | <input type="text" value="EA EACH"/> | <input type="text" value="250.0000"/> |
| GL Account * | | |
| <input type="text" value="01-6743-2431"/> | | |
| 01-6743-2431 FINANCE OFFICE : OFFICE SUPPLIES | | |
| Quantity * | Percent * | Amount * |
| <input type="text" value="1.000"/> | <input type="text" value="50.000"/> | <input type="text" value="250.00"/> |
| GL Account * | | |
| <input type="text" value="01-6734-2431"/> | | |
| 01-6734-2431 AUDIT : OFFICE SUPPLIES | | |
| Quantity * | Percent * | Amount * |
| <input type="text" value="1.000"/> | <input type="text" value="50.000"/> | <input type="text" value="250.00"/> |

Note: In conjunction with this project, the Finance Office inactivated account numbers that had not been used in 3 or more years. If the account number you are trying to enter doesn't populate, please reach out to the Finance Office jillmulders@delta.edu (989-686-9578) or ambergobel@delta.edu (989-686-9393), who will determine whether the account number should be activated or they may suggest an alternative account number to use.

Hardware/Software Purchases – There will no longer be a separate Hardware/Software Request Form. All Requisitions containing the following object codes will automatically route to OIT for review and approval, prior to routing to the Cost Center Manager for their approval. It is important to use one of these four object codes for any purchase related to computer equipment or software.

- 2422 – Software & Annual Licenses**
- 2474 – Computer Related Supplies**
- 2517 – Computer Equipment & Multi-Year Licenses**
- 2479 – Computer Repairs & Maintenance**

19. Budget Availability - When entering a requisition, the system will be verifying that there is budget available for this purchase. In the example above, the system will verify that there is \$250 unspent in 01-6743-“2400” in order to make this purchase (all expense object codes beginning in “24” roll up together and are compared against the budget that is entered in object code 2400). If there is not adequate budget dollars available, the system will produce an error message to that effect, and the requisition will not be completed. If this happens, you will need to submit a Budget Transfer request to the Finance Office to ambergobel@delta.edu to increase the budget line item, and once that is completed, the requisition can be submitted.

20. Once all fields have been completed, you are now ready to click “Save and Attach” and attach the supporting documentation for the purchase. Supporting documents will be required in most cases

except for routine, recurring supply purchases, such as replacement printer toner cartridges. If you do not need to upload an attachment, you can click on “Save”.

21. Upon submission, if you click on the View option at the top of the screen, you will see a summary of the Requisition and the next approver.

| Requisition | | | | |
|------------------|--|--|----------|--------------------------|
| Requisition Date | Requisition | | Total | Approvers/Next Approvers |
| 9/3/2025 | 0000865 Not Approved 1192158 Laser Connection LLC | | \$500.00 | Phyllis J. Meeth |

The system will send a confirmation email to the originator like the one seen below. You will note that the sample email below includes a message regarding the account being over budget. This is due to the sample requisition being created in the test account. As noted above under step 19, in the live Self-Service environment, a requisition will not be able to be submitted if an over budget situation exists.

The next approver will also receive a similar email notifying them that there is a requisition requiring their approval.

Requisition for Goods and Services Confirmation

purchasing@delta.edu
To: Cramer, Angela - Staff

The umbrella acct 01-6743-2400 is over budget by \$750.00 The umbrella acct 01-6734-2400 is over budget by \$250.00
 Requisition Number 0000865
 Requisition Status Not Approved
 Requestor Name Angela J. Cramer
 Initiator Name Angela J. Cramer

Requisition Date 09/03/25
 Desired Date 09/17/25
 Vendor ID and/or Name 1192158 Laser Connection LLC
 AP Type R REG. VENDOR PAYABLES
 Requisition Total \$500.00
 Ship to DC Delta College

Item 1
 Item Description HP4500 MICR Toner
 Vendor Item XYZ123
 Quantity 2.000
 Unit of Issue EA EACH
 Price 250.0000
 Extended Price 500.00
 GL Account Number 01-6743-2431 FINANCE OFFICE : OFFICE SUPPLIES (more...)
 Project ID

Printed Comments
 Email completed PO to Joe
 .Smith@Laserconnection.co
 m
 Comments
 This toner cartridge is for the Cashier's Office
 printer.

Approval _____ Date _____

Next Approval
 PHYLLISMEETH

You can monitor the status/flow of a requisition in Self-Service Procurement under the “View” section. You can also enter the mnemonic DORA in Colleague to see the approval flow tied to the requisition, and which individuals have completed their approval. *Please note that once a requisition has been fully approved, it is no longer viewable on DORA.*

22. If any of the approvers “Returns” the requisition rather than approving, the approver will include comments as to why it is being returned, and the originator will receive an email like the sample below which will serve as notification that a modification is required. Certain significant changes, such as an account number or amount, will trigger the Requisition to go back through the entire approval routing. Other less significant changes, such as adding an attachment, will skip the individuals in the routing who have already approved once the requested change has been made and resubmitted.

Modify a Requisition Confirmation

WARNINGS: 10/22/25 falls beyond the current fiscal year
 Requisition Number 0000868
 Requisition Total \$50.00
 Vendor ID and/or Name 1283254 Distinctive Recognition

Requisition Status Not Approved
 AP Type R REG. VENDOR PAYABLES
 Requisition Date 10/22/25
 Status Date 10/22/25
 Maintenance Date 10/22/25
 Desired Date 11/05/25
 Requestor Name Angela J. Cramer
 Initiator Name Angela J. Cramer
 Ship to DC Delta College
 Commodity Code

Item 1
 Item Description Part for Finance Office
 Vendor Item XYZ123
 Quantity 1.000
 Unit of Issue EA EACH
 Price 50.0000
 Extended Price 50.00
 GL Distribution 01-6743-2480 FINANCE OFFICE : REPAIRS/MAINTENANCE
 Project ID
 Desired Date 11/05/25
 Fixed Asset
 Tax Info
 Item Comments

Printed Comments

Comments
 This is for the Cashier's Office Printer
 [10/22/2025 09:46 Hayward, Stacey] Please include attachment

Approval Date
 Foco, Jonathan 10/22/25

23. Requisition Modifications – In order to make modifications, in Self-Service Procurement, under the View tab, identify the Requisition from your list of submitted Requisitions that was Returned for Modification and click on the hyperlink of the Requisition, which will bring up the Req details.

The screenshot shows the 'Procurement' interface. At the top, there are 'View' and 'Create' tabs, with 'View' selected. Below the tabs is a 'Filter' button. A breadcrumb trail reads 'Document Types: Requisition, Purchase Order, Payment Request'. A section titled 'Requisition' contains a table with the following data:

| Requisition Date | Requisition |
|------------------|--|
| 10/22/2025 | 0000869 Not Approved 1192158 Laser Connection LLC |

The screenshot shows the 'Requisition Details' modal window. At the top, there is a close button (X) and the requisition number '0000869' with a pencil icon for editing and a 'Delete' button. Below this are three tabs: 'Overview' (selected), 'Approvers', and 'Line Items'. The main content area displays the following details:

| | |
|-------------------------|------------------------------|
| Status | Not Approved |
| Vendor | 1192158 Laser Connection LLC |
| Amount | \$5,000.00 |
| Maintenance Date | 10/22/2025 |
| Initiator | Angela J. Cramer |
| Requestor | Angela J. Cramer |
| Attachments | View 1 |

To modify this Requisition, now click on the Pencil figure next to the Requisition #. This will pull up the Requisition detail, and you will note in the sample below that the Modify tab at the top is now selected.

Procurement

View **Modify**



Warning: 10/22/2025 falls beyond the current fiscal year.

Requisition Number 0000869

Requisition Date 10/22/2025

Make whatever modifications were requested by the approver. If an attachment is needed, there is a button near the top that allows you to Manage attachments. If you click on this button, a screen will come up allowing you to upload a file.

Attachments



Manage

1

| Approvers | Approval Date |
|-----------------|-------------------|
| Foco, Jonathan | 10/22/2025 |
| Hayward, Stacey | Awaiting Approval |

If changes are needed such as an account number, amount, item description, etc, these changes are made in the Items section. Scroll down the screen to “Items”, and click on the Pencil image on the right hand side of the item requiring modification. This will bring up the Item details and the changes can now be made. Once the changes have been made to the Item detail, click the “Update Item” button at the bottom. This will prompt another email to go out to the appropriate next approver, dependent on the type of change that was made.

Items

| Line Items | Description | Vendor Part | Quantity | Unit | Price | Extended Price | |
|------------|---|-------------|----------|------|--------------|----------------|--|
| 1 | Fee for September Endowment management services | | 1.000 | EA | \$5,000.0000 | \$5,000.00 | |

[Add Item](#)

24. Trade Discounts – If your purchase includes Trade Discount terms, this information cannot be entered until the Requisition has initially been created and Saved/Submitted. At this point, you can update the Requisition following the steps in #23 above for Modifying a Requisition and click on the grey bar “Additional Details” at the bottom which will bring up additional fields including Trade Discount. The Trade Discount can be entered as either a percentage or an amount, whichever is appropriate. In the example below we have entered a percent. Whether entering a

percentage or a specific amount, the number is entered as a positive and the system will automatically deduct this Trade Discount from the gross item amount entered previously (see #17 of the instructions). After the Trade Discount has been entered, click on the “Update Item” button.

Additional Details

Commodity

Desired Date

11/5/2025



Tax Form

None



Box Number

None



State

Trade Discount Amount

Trade Discount Percent

10.000

Fixed Asset

None



Line Item Comments

Cancel

Update Item

PROCUREMENT REQUISITIONS - FREQUENTLY ASKED QUESTIONS:

1. Q: The system says that my budget is not sufficient to submit a requisition. I have determined it is due to a blanket PO. How do I adjust the amount of a blanket PO?
A: Contact businessservices@delta.edu to request an amount adjustment to your Blanket PO. Include the vendor name and PO number in your email. Business Services is able to increase or decrease Blanket PO amounts.
2. Q: I am unable to submit a Requisition request due to inadequate budget availability. How do I get additional funds added to my budget?
A: Refer to processing step #19. If there is additional funding available in another budget line within the same cost center, complete a Budget Transfer Form indicating the amount to transfer between the two object code lines, and submit the form to the Finance Office. If there is not adequate funding within one of your cost centers, you will need to reach out to your supervisor or Budget Group Leader to determine if there is funding available in another cost center within the division or budget group. Please note that the Cost Center Manager of the cost center that the funding is coming from, must sign off on the Budget Transfer Form. **Please note that budget transfers may only take place between General Fund accounts.**
3. Q: I am attempting to enter a vendor name, but it is not found in the system, how should I proceed?
A: Refer to processing step #11.
4. Q: If I am submitting an online requisition for the purchase of computer hardware or software, do I still need to submit and Hardware Software Request?
A: No, for any requisition charged to the following object codes: 2422, 2474, 2517, 2479, the requisition is programmed to automatically route to OIT, who will determine if the purchase is allowable and make their recommendations.
5. Q: Do I submit a requisition to obtain a reimbursement for mileage or a purchase that I made personally for my cost center?
6. A: No, reimbursements are processed as Payment Requests rather than Requisitions. This selection is made from the drop down arrow documented in processing step #5. Please note that reimbursements charged to PDA accounts are not able to be processed online. These will continue to be done in paper form.
7. Q: What if I already have an invoice, do I still need to submit a Requisition?
A: Yes, submit a Requisition, but in the internal comments, make note that the item does not need to be ordered, and the invoice is attached. The Business Office will create the PO and pay it from the attached invoice.