

Self Service- Procurement

Approver Training Guide


In an effort to improve processing efficiencies, the College will begin utilizing Ellucian Self-Service Procurement to process Requisitions and Reimbursement Payment Requests online. This process will be used for all General Fund purchases of goods and services requiring a Purchase Order and also for reimbursement payments. 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 the individuals who are authorized to initiate (originate) and approve a requisition or payment request on behalf of the particular office/division/program. Once submitted, the online document will route automatically based on an approval hierarchy that has been defined in the system.

Individuals who have been defined in Colleague as Cost Center Managers will approve online requisitions/payment requests submitted by individuals for cost centers that they oversee. Once a Requisition/Payment Request has been entered and successfully submitted, the next approver will receive an email from Purchasing@Delta.edu notifying them that there is a requisition or voucher in progress requiring their approval, see sample email below. *You will note in the sample email below a statement that the account is over budget. This is due to the sample transaction being created in the Test environment. In the Live environment, a Requisition or reimbursement Payment Request will not be able to be submitted if the remaining budget is not sufficient to cover the transaction.*

In the case of a reimbursement Payment Request, the system generated email will refer to a Voucher rather than a Requisition, however the approval procedure and routing is the same for both types of transactions.

Approval needed for Requisition 0000867

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

The umbrella acct 01-6743-2400 is over budget by \$1,055.00

Requisition Number 0000867
Requisition Status Not Approved
Requestor Name Stacy K. Schlicker
Initiator Name Stacy K. Schlicker

Requisition Date 10/15/25
Desired Date 10/29/25
Vendor ID and/or Name 1192158 Laser Connection LLC
AP Type R REG. VENDOR PAYABLES
Requisition Total \$155.00
Ship to DC Delta College

Item 1
Item Description Printer parts
Vendor Item ABC123
Quantity 1.000
Unit of Issue EA EACH
Price 155.0000
Extended Price 155.00
GL Account Number 01-6743-2431 FINANCE OFFICE : OFFICE SUPPLIES
Project ID

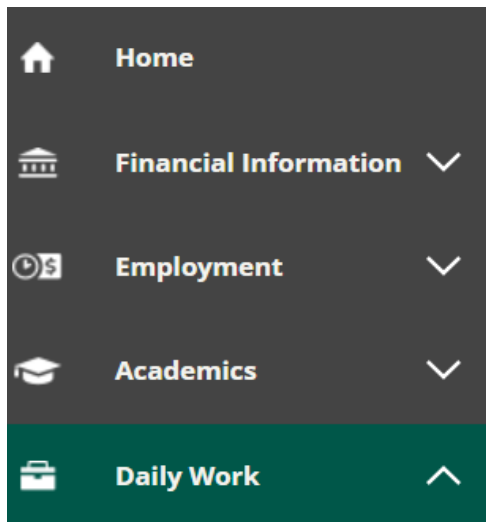
Printed Comments
Comments

Approval Date

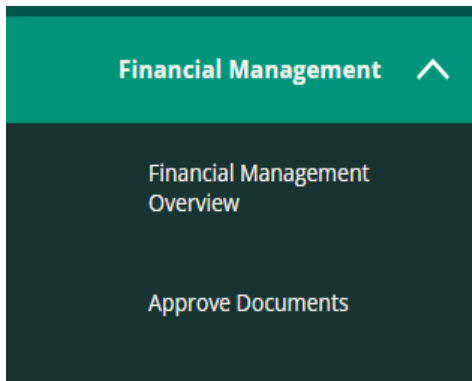
Next Approval
AJCRAMER

Below is a step-by-step guide to approve an online requisition or reimbursement payment request.

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.



3. Click on the Financial Management down arrow, then click on “Approve Documents” from the list of options that populates.



- A list of all Requisitions and Vouchers (Payment Requests) requiring your approval will appear in the dashboard.

Approve Documents


Approve History

Requisitions

Approve/Return	Next Approver	Requisition / Date / Vendor	Approvers / Next Approvers	Total
<input type="checkbox"/>	Next Approver Lookup	0000867 10/15/2025 Laser Connection LLC	Angela J Cramer	\$155.00

- Click on the Requisition or Voucher # hyperlink to detail into the document requiring approval. Requisition Details will appear in the upper right corner of the screen, including three tabs: Overview, Approvers and Line Items.
- Requisition Overview: See below for a sample of the Overview screen. Note: Maintenance Date is the date that the requisition/voucher was submitted. If the submitter Attached supporting documentation, there will be an oval button containing a picture of a document and the word “View” and it will indicate the number of attachments. In most cases, supporting documentation will be required unless it is for a standard routinely purchased item, such as printer toner. The approver should open the attachments and review them against the line-item detail entered in the requisition/voucher.

Requisition Details ✕

0000869  | **Delete**

Overview **Approvers** Line Items

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

Additional Details ▾

Printed Comments

Internal Comments



Stacey Hayward AP type to the correct AP of PNC

7. Approvers – This displays those individuals in the approval queue who have already approved the document and the next person who has yet to approve it.

Requisition Details ✕

0000867

Overview **Approvers** Line Items

Approvers	Approval Date
 Angela J Cramer	10/15/2025
 Hayward, Stacey	<i>Awaiting Approval</i>

8. Line Items – This tab includes the item(s) description and extended price. You can click into each line item to display additional detail, including the General Ledger account number.

Requisition Details
✕

000867

Overview
Approvers
Line Items

< Back to Line Items

Printer parts **\$155.00**

Quantity 1

Unit EA

Price \$155.0000

GL Account

^ 01-6743-2431
 FINANCE OFFICE : OFFICE SUPPLIES

Item Code

Quantity 1

Amount \$155.00

Remaining Balance (\$1,055.00) ☰

Vendor Part ABC123

Desired Date 10/29/2025

Tax Form/Box No/State

Commodity

Trade Discount Percent

Trade Discount Amount

Fixed Assets

Line Item Comments

The approver should review the requisition/voucher line items closely to ensure that the information entered agrees to supporting documentation, and that the GL Account number(s) entered is appropriate.

9. Approve - After all detail has been reviewed, if everything is in order, on the main screen (see #4 above for an illustration) click the check box and hit the submit button at the bottom. If there is a problem identified during your review such as missing attachments or incorrect GL Account numbers entered, the requisition/voucher needs to be “Returned”. See # 11 for Return instructions.

Requisitions

Approve/ Return	Next Approver	Requisition / Date / Vendor
<input checked="" type="checkbox"/>	↶ <div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block; margin-top: 5px;"> Next Approver Lookup 🔍 </div>	000867 10/15/2025 Laser Connection LLC

Submit

10. Once a requisition/voucher is approved, the screen will return an approval confirmation, see below. If you click on the Req # hyperlink, additional detail will be provided. Clicking on the

History tab will provide summary information related to this requisition. The system will also send an email to the next approval in the defined approval hierarchy.

Approve History

Approval Confirmation

The following documents were updated or created.

Document Type	Document
Requisition	0000867

11. Returning a Requisition – If errors are noted during your review such as missing information, errors in amounts, GL account numbers, etc. the document should be “Returned” rather than Approved. At the main Approve Documents screen (see instruction line # 4 above), click on the Blue arrow next to the check box and a dialogue box will pop up to enter comments as to why the Requisition is being returned. The comments will be included in the email that the submitter receives so that they will know what needs to be corrected.

12. To review the Status of a requisition or voucher in Colleague, enter the mnemonic DORA and enter the requisition or voucher #, as applicable, (leading zeroes are not required). Please not in the screen shot below that a requisition is entered in the top left, while a voucher is entered in the top right. Note: Once a requisition or voucher has been fully approved, it is no longer viewable on DORA.

DORA - Document Routing Approvers ☆

Save Save All Cancel

Requisition No: 0000867 Voucher/Payment Req ID: [...]

Purchase Order No: [...] AR Voucher ID: [...]

BPO No: [...] Recurring Voucher ID: [...]

Routing Approvers		Approval Types	Next Approvers	
1	Angela J Cramer	C Cost Center Manage	1	Hayward, Stacey
2	Hayward, Stacey	B Business Services	2	
3			3	
4			4	
5			5	
6			6	
7				
8				
9				

Approved By: 1 Angela J Cramer Date: 10/15/2025

13. The final approval is performed by the Business Services Specialist. Once that final approval has happened, in the case of a requisition, they will generate the PO in Colleague which will automatically pull all of the information over from the online requisition. For a Voucher (Payment Request) once all approvals have happened, the voucher has been completed in Colleague and will automatically be included in the following Accounts Payable check run.

14. Approvers can also review the status of requisitions/vouchers routed to them for approval by clicking on the History tab on the Approve Documents Screen. Clicking into the document # hyperlink will provide additional details. Possible statuses of a Requisition are Not Approved, Outstanding (fully approved but no PO created yet) and PO Created. For a Voucher, the statuses are Not Approved, Outstanding, and Paid.

Approve Documents

Approve **History**

[Filter](#)

Requisitions

Requisition				Approvers		
0000869	10/29/2025	Outstanding	Laser Connection LLC		Hayward, Stacey	10/29/2025
0000868	10/22/2025	PO Created	Distinctive Recognition		Hayward, Stacey	10/22/2025