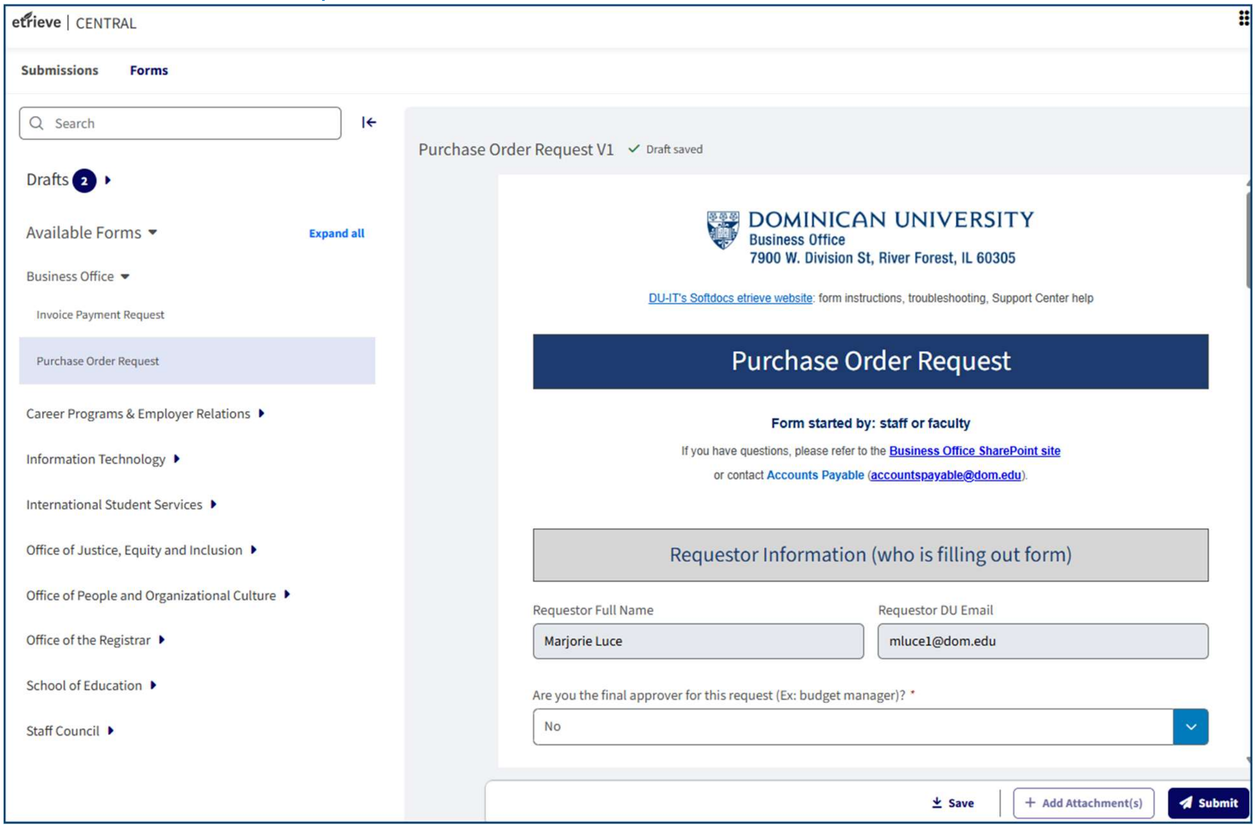
Softdocs etrieve - Form Instructions

BUS Purchase Order Request

Direct link to form: https://dom.etrieve.cloud/central/forms/389



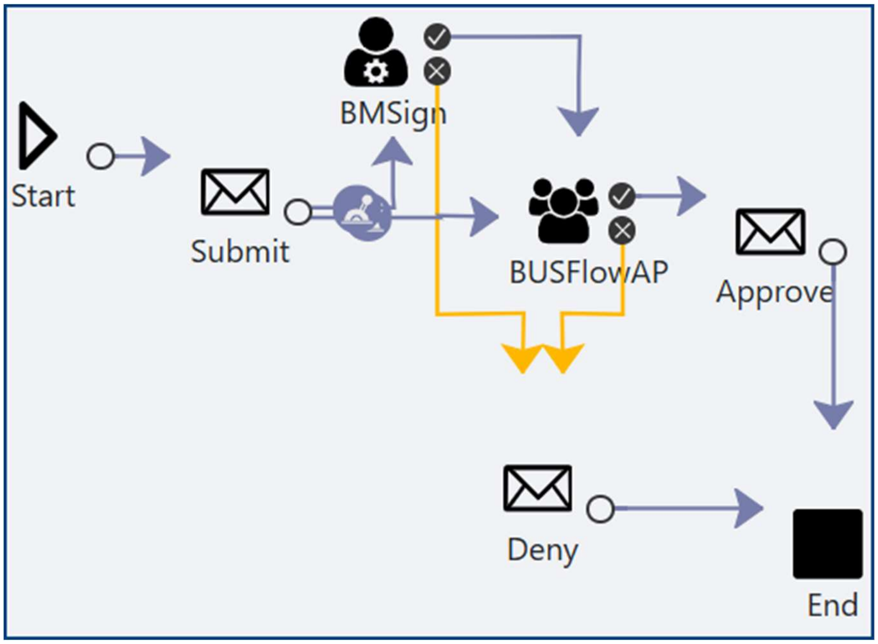
Alternate access:

1. Open Softdocs etrieve: https://dom.etrieve.cloud/central
2. Click on “Forms”
3. Scroll down to “Information Technology” section (or search form name in box at top)
4. Click on desired form

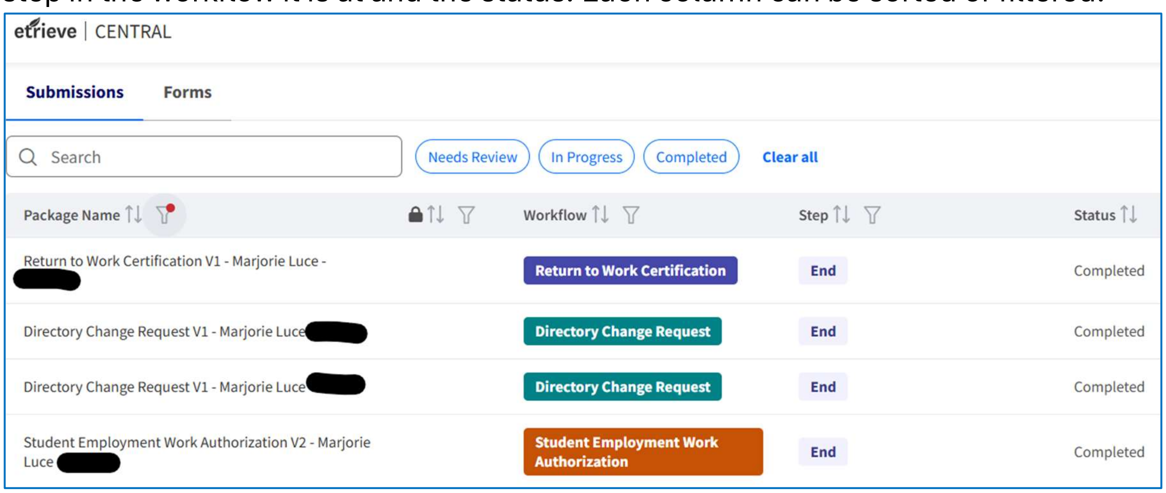
Softdocs etrieve issues: Please submit a Support Ticket to Information Technology https://support.dom.edu/TDClient/2074/Portal/Requests/Service/53278/Report-a-Softdocs-Etrieve-Issue/Request

Workflow process:

1. Requestor starts form and their information autofills.
2. If Requestor is Budget Manager/Director/Dean (BMDD), then they sign and receive email confirming submission.
3. If Requestor is NOT BMDD, then BMDD receives an email notification to approve/deny.
4. Business Office receives an email notification to approve/deny.
5. Requestor receives an email confirming approval or denial.
6. Form files in Softdocs etrieve Content (document repository).

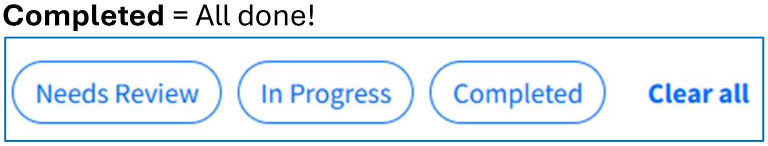


Submissions: Once someone touches a form (submitted, reviewed, approved, denied, or signed), then they can check the status at any time via their Submissions tab in etrieve Central. The form is viewable as it is filled out at that moment in time. It will show which step in the workflow it is at and the status. Each column can be sorted or filtered.

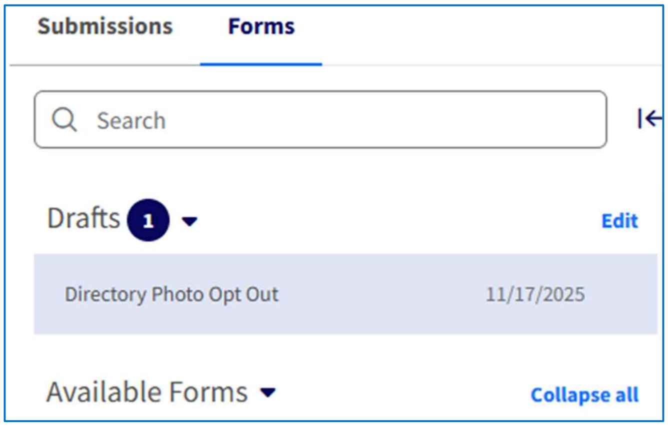


Package Name	Workflow	Step	Status
Return to Work Certification V1 - Marjorie Luce - [redacted]	Return to Work Certification	End	Completed
Directory Change Request V1 - Marjorie Luce[redacted]	Directory Change Request	End	Completed
Directory Change Request V1 - Marjorie Luce[redacted]	Directory Change Request	End	Completed
Student Employment Work Authorization V2 - Marjorie Luce [redacted]	Student Employment Work Authorization	End	Completed

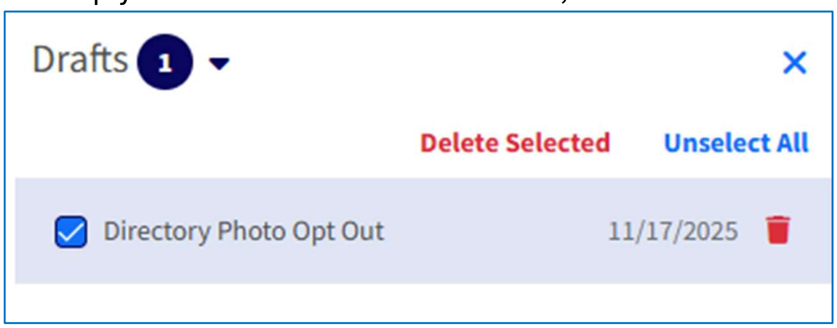
Needs Review = YOU need to act
In Progress = SOMEONE ELSE needs to act
Completed = All done!



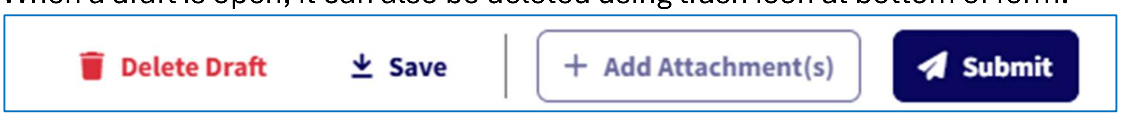
Draft form:
A draft form will be saved automatically and can be resumed at any time (or deleted).



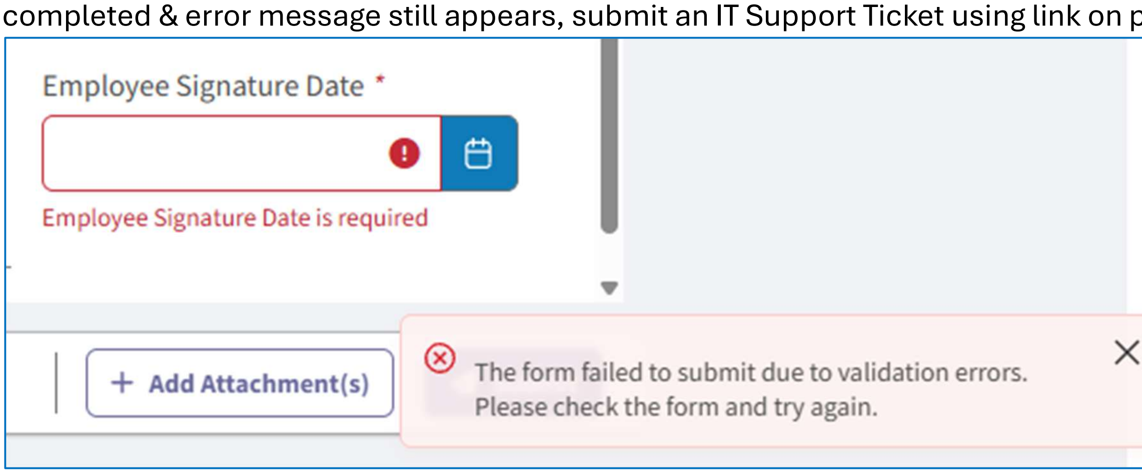
From the form list, click “edit,” checkmark draft to delete, click trash icon.
Or simply hover over the draft form name, then click trash icon.



When a draft is open, it can also be deleted using trash icon at bottom of form.



Form errors:
All boxes with red asterisk must be completed to “submit” a form. If all required fields are completed & error message still appears, submit an IT Support Ticket using link on page 1.



Example screenshots:

DOMINICAN UNIVERSITY
Business Office
7900 W. Division St, River Forest, IL 60305

DU-IT's Softdocs etrieve website: form instructions, troubleshooting, Support Center help

Purchase Order Request

Form started by: staff or faculty

If you have questions, please refer to the **Business Office SharePoint site**

or contact **Accounts Payable** (**accountspayable@dom.edu**).

Requestor Information (who is filling out form)

Requestor Full Name	Requestor DU Email
Marjorie Luce	mluce1@dom.edu

Only complete BM section if answer is NO

Are you the final approver for this request (Ex: budget manager)? *

No

Approver: Budget Manager (BM) Information

1. **Name Search:** type a few letters of the person's first or last name (NO comma)
2. **Search Results:** click dropdown arrow to see choices
   - choose the name with correct email
   - verify email is correct after autofill completes refresh

BM Name Search *

klein

BM Search Results *

Emily Klei[redacted]

Gary Klei[redacted]

Keith Klei[redacted]

Mason Klei[redacted]

Todd Kleine - tdkleine@dom.edu

BM DU Email

confirm email is correct

BM Name Search *

Todd Kleine

BM Search Results *

Todd Kleine - tdkleine@dom.edu

click arrow to see search results

BM DU Email

tdkleine@dom.edu

confirm email is correct

To search by a vendor name... or portion of a vendor name

Vendor Information

1. **ID or Name Search:** type a few letters of the vendor ID... or vendor name... or a person's first or last name (NO comma)
2. **Search Results:** click dropdown arrow to see choices
   - choose the name with correct ID
   - verify vendor information below (email, phone, and address)

Vendor Name or ID Search *

electric

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results

Addison Electric - 6[redacted]

Belec Electrical Inc - 9[redacted]

Connor Electric Services, Inc. - 9[redacted]

D & J Electric Inc. - 7[redacted]

Integrated Electrical Services, LLC - 9[redacted]

Once a choice is made, then other boxes autofill

Vendor Name or ID Search *

electric

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results

Integrated Electrical Services, LLC - 9[redacted]

click arrow to see search results

Vendor DU ID	Vendor Name
9[redacted]	Integrated Electrical Services, LLC

To search by a vendor ID (Jenzabar ID)... or portion of a vendor ID

Vendor Information

1. **ID or Name Search:** type a few letters of the vendor ID... or vendor name... or a person's first or last name (NO comma)
2. **Search Results:** click dropdown arrow to see choices
   - choose the name with correct ID
   - verify vendor information below (email, phone, and address)

Vendor Name or ID Search *

789

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results

Adlers Foreign Books Inc. - 789[redacted]

Archdiocese Of Chicago - 789[redacted]

Association Of Governing - 789[redacted]

Association Of Governing - 789[redacted]

Ballet Folklorico Sones Mexicanos, LLC - [redacted]789

Once a choice is made, then other boxes autofill

Vendor Name or ID Search *

789

Examples: "87171" or "Electric" or "Prospect Electric Company" or "Sanchez"

Vendor Search Results

Association Of Governing - 789[redacted]

click arrow to see search results

Vendor DU ID	Vendor Name
789[redacted]	Association Of Governing

Verify vendor information that autofills and make any notes

Add a "Vendor Note" below for the Business Office if:

- Missing or incorrect information appears below about the vendor chosen.
- You can't find a matching vendor in the search results. You may need to submit a W9 if a new vendor needs to be added to DU's payment system.

Vendor Note

Vendor Email

Vendor Phone #

6306288080

Vendor Physical Address

502 Factory Rd.

Vendor City	Vendor State	Vendor Zip
Addison	IL	60101

Purchase Order Information

Item Description *

Laptop

Quantity *

1

Item Unit Cost *

$ $1,000.00

Item Total Cost

$1,000.00

×

Item Description *

Monitors

Quantity *

2

Item Unit Cost *

$ $99.00

Item Total Cost

$198.00

×

Add Additional Item

Total Cost of All Items

$1,198.00

Fiscal Year *

2026-27

FY runs July 1-June 30

Payment Terms *

net 30

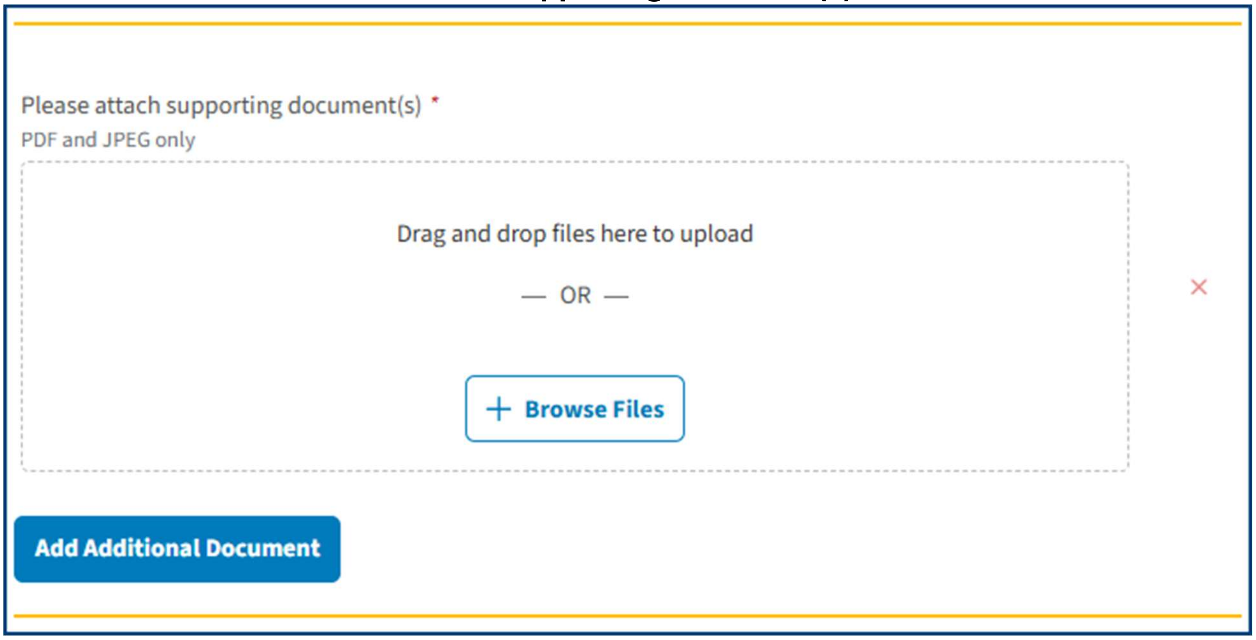
net 30, upon receipt, 1st of month, etc.

Add a "Purchase Order Note" below for the Business Office if:

- You only want to pay a portion of the total cost
- You have additional information to provide

Purchase Order Note

Attach supporting document(s)



To search by account # (account code, budget code)… or portion of account

1. **ID of Name Search:** type part of sundry/GL account code (budget code)… or part of department name (NO dashes or spaces in account #)
2. **Search Results:** click dropdown arrow to see choices
   - choose primary account number and verify department/description
   - if you can't find a match, then contact Accounts Payable (accountspayable@dom.edu).

Account # Search *

04.3400

Examples: "04.3400" or "04.3400.3410" or "Information Technology" or "Tech"

Account # Search Results *

04.3400.3410 - INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

04.3400.3420 - INFORMATION TECHNOLOGY : SAL ADMIN: STAFF

04.3400.3424 - INFORMATION TECHNOLOGY : SAL ADMIN-VSP OFFSET

04.3400.3450 - INFORMATION TECHNOLOGY : SAL ADMIN: CLERICAL

04.3400.3610 - INFORMATION TECHNOLOGY : ST EMPL: DU STUDENT

Once a choice is made, then other boxes autofill

Account # Search *

04.3400

Examples: "Information Technology" or "04.3400"

Account # Search Results *

04.3400.3420 - INFORMATION TECHNOLOGY : SAL ADMIN: STAFF

click arrow to see search results

Primary Account #

04.3400.3420

Primary Account Department

INFORMATION TECHNOLOGY

To search by account name… or portion of account name

1. **ID of Name Search:** type part of sundry/GL account code (budget code)… or part of department name (NO dashes or spaces in account #)
2. **Search Results:** click dropdown arrow to see choices
   - choose primary account number and verify department/description
   - if you can't find a match, then contact Accounts Payable (accountspayable@dom.edu).

Account # Search *

tech

Examples: "04.3400" or "04.3400.3410" or "Information Technology" or "Tech"

Account # Search Results *

04.3400.3420 - INFORMATION TECHNOLOGY : SAL ADMIN: STAFF

04.3280.8810 - TEACHING & LEARNING TECHNOLOGIES : COPIER CHARGES

04.3400.3410 - INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

04.3400.3420 - INFORMATION TECHNOLOGY : SAL ADMIN: STAFF

04.3400.3424 - INFORMATION TECHNOLOGY : SAL ADMIN-VSP OFFSET

04.3400.3450 - INFORMATION TECHNOLOGY : SAL ADMIN: CLERICAL

Once a choice is made, then other boxes autofill

Account # Search *

tech

Examples: "Information Technology" or "04.3400"

Account # Search Results *

04.3400.3410 - INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

click arrow to see search results

Primary Account #

04.3400.3410

Primary Account Department

INFORMATION TECHNOLOGY

PO for FULL cost under SINGLE Account

Primary Account #: 04.3400.3410

Primary Account Department/Description: INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

Do you want PO for FULL cost entered above using only Primary Account #? *

Yes

Select No if PARTIAL PO or MULTIPLE ACCOUNTS used

PO for FULL cost under MULTIPLE Account

Primary Account #: 04.3400.3410

Primary Account Department/Description: INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

Do you want PO for FULL cost entered above using only Primary Account #? *

No

Select No if PARTIAL PO or MULTIPLE ACCOUNTS used

Account	PO Amount
Account #1: 04.3400.3410	PO Amount 1 *: $ $1,000.00
Account #2: 04.3400.3420	PO Amount 2: $ $99.00
Account #3: 04.3400.3430	PO Amount 3: $ $99.00
Account #4: 99.9999.9999	PO Amount 4: $
Account #5: 99.9999.9999	PO Amount 5: $

Total PO Requested: $1,198.00

PO for PARTIAL cost (must list breakdown and which account #)

Primary Account #

04.3400.3410

Primary Account Department/Description

INFORMATION TECHNOLOGY : SAL ADMIN: EXECUTIVE

Do you want PO for FULL cost entered above using only Primary Account #? *

No

Select No if PARTIAL PO or MULTIPLE ACCOUNTS used

Account #1

04.3400.3410

PO Amount 1 *

$ $500.00

Total PO Requested

$500.00

Signature

Budget Manager (BM) Signature *

I understand that this constitutes my legal signature on this document.

BM Signature Date *

Approved? *

If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.


Signature

Draw Type

M. Luce

Clear

I understand that this constitutes my legal signature on this document.

Cancel Create Signature

Draw OR Type your signature

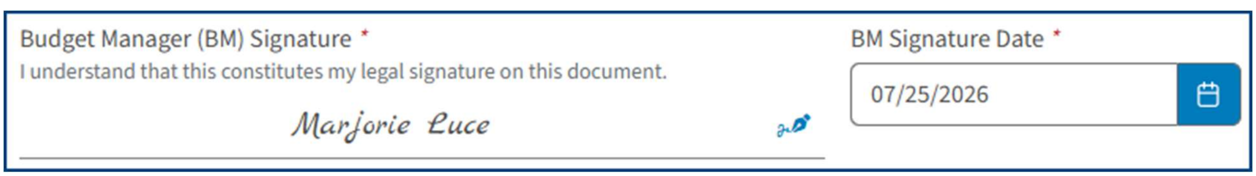

Draw Type

Full Name

Marjorie Luce

Preview

Marjorie Luce


Budget Manager (BM) Signature *

I understand that this constitutes my legal signature on this document.

Marjorie Luce

BM Signature Date *

07/25/2026

Approve, Partial Approve, Deny


Approved? *

Yes

Partial

No

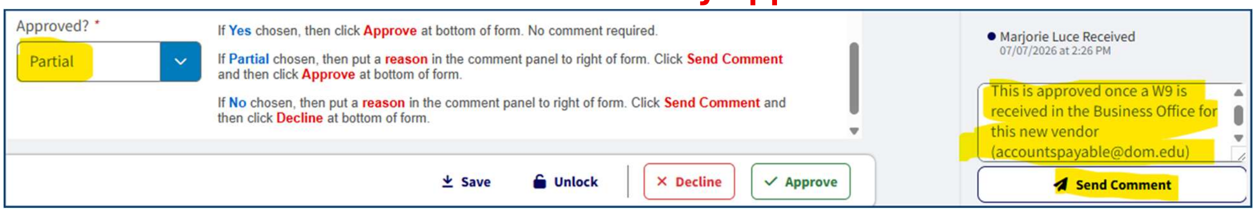
If **Yes** chosen, then click **Approve** at bottom of form. No comment required.

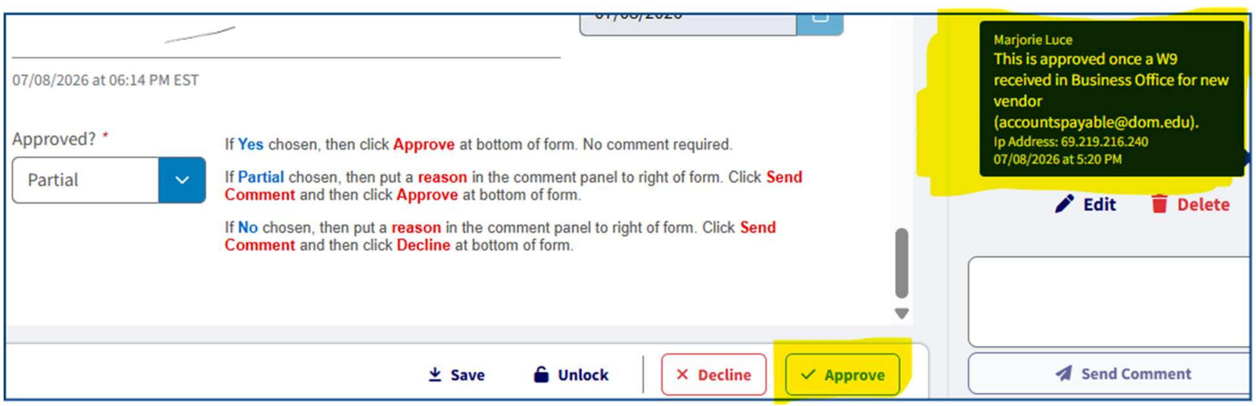
If **Partial** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Approve** at bottom of form.

If **No** chosen, then put a **reason** in the comment panel to right of form. Click **Send Comment** and then click **Decline** at bottom of form.

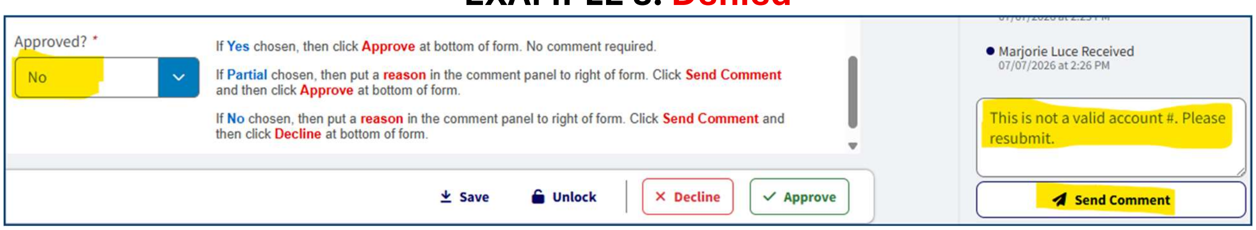
EXAMPLE 1: Approved

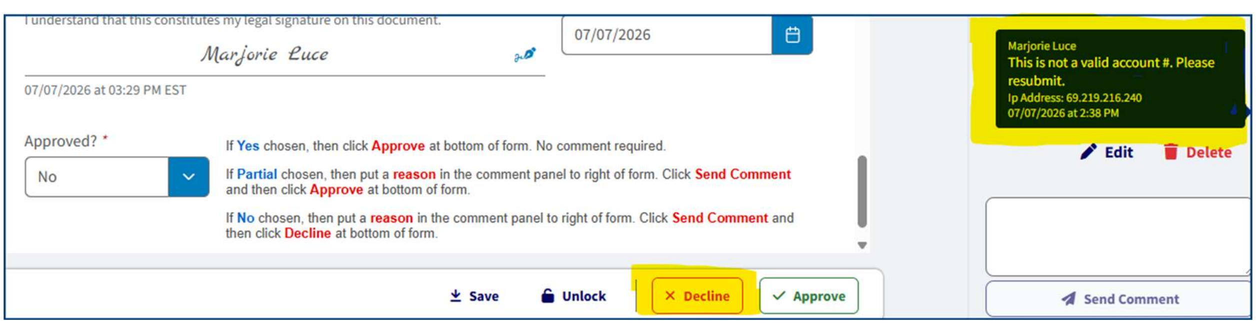
EXAMPLE 2: Partially Approved



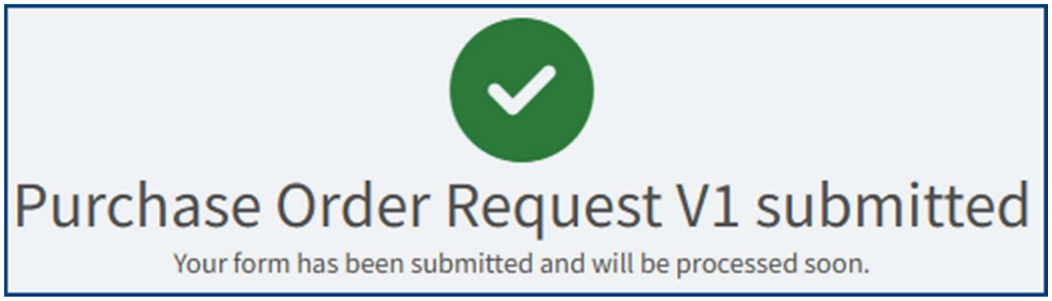


EXAMPLE 3: Denied





DON'T FORGET TO SUBMIT!



Business Office creates purchase order