

Softdocs etrieve - Form Instructions

BUS Purchase Order Request

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

The screenshot displays the 'etrieve | CENTRAL' web interface. On the left sidebar, under the 'Forms' tab, the 'Purchase Order Request' form is highlighted. The main content area shows the form title 'Purchase Order Request V1' with a 'Draft saved' status. Below this is the Dominican University Business Office logo and address: 'DOMINICAN UNIVERSITY Business Office, 7900 W. Division St, River Forest, IL 60305'. A link for 'DU-IT's Softdocs etrieve website' is provided. The form itself is titled 'Purchase Order Request' and indicates it is 'Form started by: staff or faculty'. It includes instructions to refer to the 'Business Office SharePoint site' or contact 'Accounts Payable' at 'accounts payable@dom.edu'. The 'Requestor Information' section contains fields for 'Requestor Full Name' (Marjorie Luce) and 'Requestor DU Email' (mluce1@dom.edu). A dropdown menu for 'Are you the final approver for this request (Ex: budget manager)?' is set to 'No'. At the bottom right, there are buttons for 'Save', 'Add Attachment(s)', and 'Submit'.

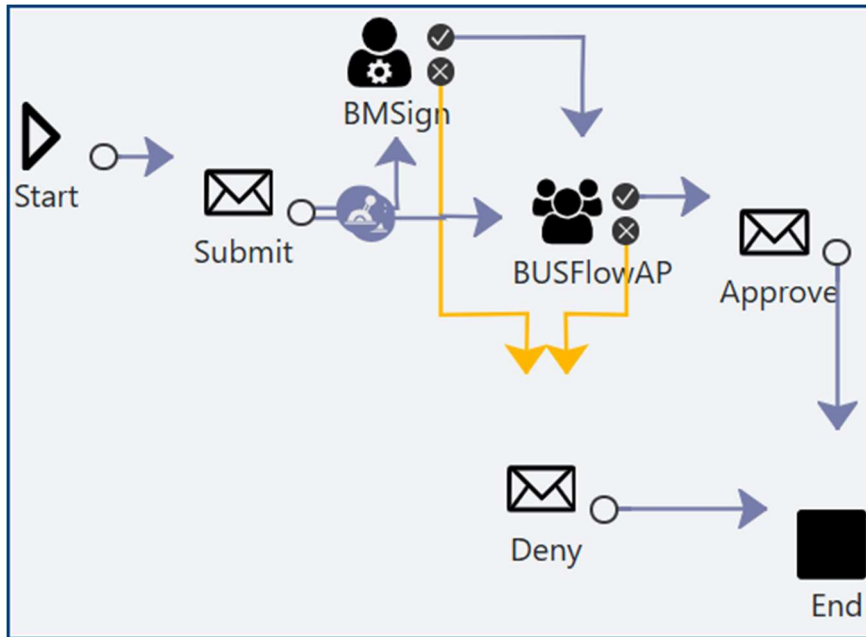
Alternate access:

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.

etrieve CENTRAL				
Submissions		Forms		
Search		Needs Review In Progress Completed Clear all		
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!

[Needs Review](#)
[In Progress](#)
[Completed](#)
[Clear all](#)

Draft form:

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

Submissions **Forms**

Search

Drafts **1** [Edit](#)

Directory Photo Opt Out 11/17/2025

Available Forms [Collapse all](#)

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.

Drafts **1** [X](#)

[Delete Selected](#) [Unselect All](#)

☒ Directory Photo Opt Out 11/17/2025

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

[Delete Draft](#) [Save](#) [+ Add Attachment\(s\)](#) [Submit](#)

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.

Employee Signature Date *

Employee Signature Date is required

[+ Add Attachment\(s\)](#)

The form failed to submit due to validation errors. Please check the form and try again.

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
 - o choose the name with correct email
 - o 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

Integrated Electrical Services, LLC - 9

Addison Electric - 6

Belec Electrical Inc - 9

Connor Electric Services, Inc. - 9

D & J Electric Inc. - 7

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

click arrow to see search results

Vendor DU ID

9

Vendor Name

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

Archdiocese Of Chicago - 789

Association Of Governing - 789

Association Of Governing - 789

Ballet Folklorico Sones Mexicanos, LLC - 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

click arrow to see search results

Vendor DU ID

789

Vendor Name

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

Addison

Vendor State

IL

Vendor Zip

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)

Please attach supporting document(s) *

PDF and JPEG only

Drag and drop files here to upload

— OR —

+ Browse Files



Add Additional Document

Please attach supporting document(s) *

PDF and JPEG only



[Test Attachment.pdf](#)



Add Additional Document

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
 - o choose primary account number and verify department/description
 - o if you can't find a match, then contact **Accounts Payable** (accountspayable@dom.edu).

Account # Search *

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 *

Examples: "Information Technology" or "04.3400"

Account # Search Results *



click arrow to see search results

Primary Account #

Primary Account Department

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
 - o choose primary account number and verify department/description
 - o if you can't find a match, then contact **Accounts Payable** (accountspayable@dom.edu).

Account # Search *

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 *

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 #	Primary Account Department/Description
04.3400.3410	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 #	Primary Account Department/Description
04.3400.3410	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	PO Amount 1 *
04.3400.3410	\$ \$1,000.00
Account #2	PO Amount 2
04.3400.3420	\$ \$99.00
Account #3	PO Amount 3
04.3400.3430	\$ \$99.00
Account #4	PO Amount 4
99.9999.9999	\$
Account #5	PO Amount 5
99.9999.9999	\$
Total PO Requested	
\$1,198.00	

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

Primary Account #	Primary Account Department/Description
04.3400.3410	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	PO Amount 1 *
04.3400.3410	\$ \$500.00

Total PO Requested	
\$500.00	
Signature	
Budget Manager (BM) Signature *	BM Signature Date *
I understand that this constitutes my legal signature on this document.	
	
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

Clear

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

Cancel

Create Signature

Draw OR Type your signature

Draw

Type

Full Name

Preview

Budget Manager (BM) Signature *
 I understand that this constitutes my legal signature on this document.

BM Signature Date *

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

Approved? *

Yes 

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.

 Save  Unlock  

EXAMPLE 2: Partially Approved

Approved? *

Partial 

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.

 Save  Unlock  

● Marjorie Luce Received
07/07/2026 at 2:26 PM

This is approved once a W9 is received in the Business Office for this new vendor (accountspayable@dom.edu)



07/08/2026 at 06:14 PM EST

Approved? *

Partial 

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.

 Save  Unlock  

Marjorie Luce
This is approved once a W9 received in Business Office for new vendor (accountspayable@dom.edu).
Ip Address: 69.219.216.240
07/08/2026 at 5:20 PM

 Edit  Delete



EXAMPLE 3: Denied

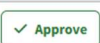
Approved? *

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.

 Save  Unlock  

● Marjorie Luce Received
07/07/2026 at 2:26 PM

This is not a valid account #. Please resubmit.



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

Marjorie Luce 

07/07/2026

07/07/2026 at 03:29 PM EST

Approved? *

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.

 Save  Unlock  

Marjorie Luce
This is not a valid account #. Please resubmit.
Ip Address: 69.219.216.240
07/07/2026 at 2:38 PM

 Edit  Delete



DON'T FORGET TO SUBMIT!



Purchase Order Request V1 submitted

Your form has been submitted and will be processed soon.

Business Office creates purchase order

Business Office Use Only

BUS Notes

PO Number *

123

PO Date *

07/25/2026

PO Amount *

\$

\$200.00

Please attach purchase order *

PDF and JPEG only

Drag and drop a file here to upload

— OR —

+ Browse Files

Save

Unlock

Decline

Approve

Please attach purchase order *

PDF and JPEG only

✓

[Test Attachment.pdf](#)

Save

Unlock

Decline

Approve