

# Approve Documents

You will get an email notification when you have documents to approve.



**donotreply@daemen.edu**

to me ▾

Thu,

Requisition Number 0000091

Requisition Total \$3,840.00

Vendor ID and/or Name 0129136 CDW Government

Requisition Status Not Approved

AP Type CC Credit Card

Requisition Date 03/20/25

Status Date 03/20/25

Maintenance Date 03/20/25

Desired Date

Requestor Name Melaine Kenyon

Initiator Name Melaine Kenyon

Ship to DC Daemen University - Mailroom

Commodity Code

Printed Comments

Comments

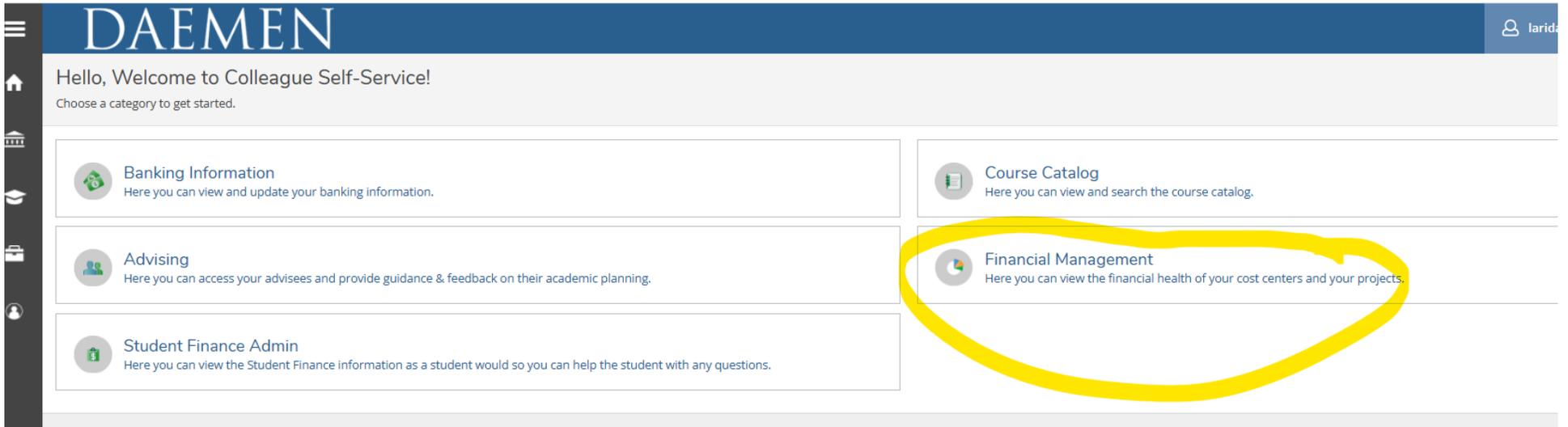
Approval	Date
Melaine Kenyon - VP/CIO	03/20/25
Chris Pack	03/20/25

Next Approval

DCHAMBER

LARIDA

Login to Self Service and go to:  
**FINANCIAL MANAGEMENT tile**



The screenshot shows the Daemen Self-Service portal home page. The header features the Daemen logo and a user profile icon labeled 'larida'. Below the header, a welcome message reads 'Hello, Welcome to Colleague Self-Service!' followed by the instruction 'Choose a category to get started.' The main content area contains six tiles: 'Banking Information', 'Course Catalog', 'Advising', 'Financial Management', and 'Student Finance Admin'. The 'Financial Management' tile is circled in yellow. A vertical navigation bar on the left side contains icons for home, building, graduation cap, briefcase, and user profile.

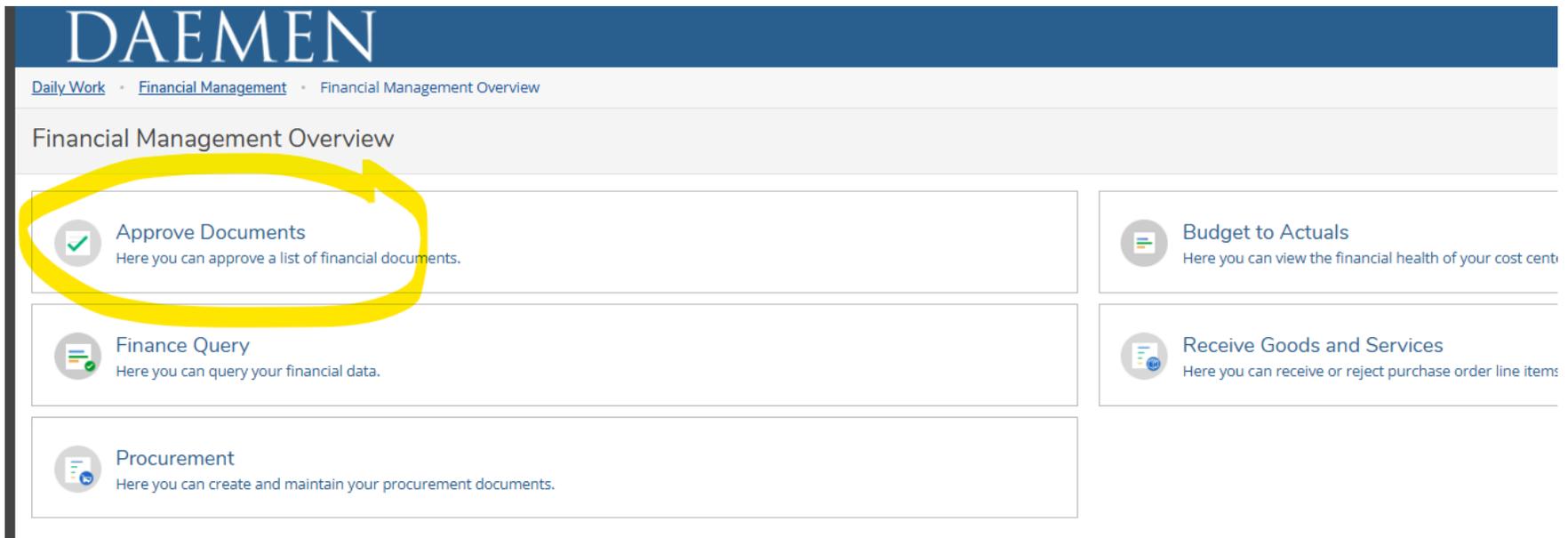
**DAEMEN**

larida

Hello, Welcome to Colleague Self-Service!  
Choose a category to get started.

- Banking Information**  
Here you can view and update your banking information.
- Course Catalog**  
Here you can view and search the course catalog.
- Advising**  
Here you can access your advisees and provide guidance & feedback on their academic planning.
- Financial Management**  
Here you can view the financial health of your cost centers and your projects.
- Student Finance Admin**  
Here you can view the Student Finance information as a student would so you can help the student with any questions.

Next chose the **APPROVE DOCUMENTS TILE**



The screenshot shows the 'Financial Management Overview' page in the Daemen Self-Service portal. The breadcrumb trail at the top reads 'Daily Work > Financial Management > Financial Management Overview'. The page title is 'Financial Management Overview'. The main content area contains six tiles: 'Approve Documents', 'Finance Query', 'Procurement', 'Budget to Actuals', and 'Receive Goods and Services'. The 'Approve Documents' tile is circled in yellow. A vertical navigation bar on the left side contains icons for home, building, graduation cap, briefcase, and user profile.

**DAEMEN**

Daily Work > Financial Management > Financial Management Overview

Financial Management Overview

- Approve Documents**  
Here you can approve a list of financial documents.
- Finance Query**  
Here you can query your financial data.
- Procurement**  
Here you can create and maintain your procurement documents.
- Budget to Actuals**  
Here you can view the financial health of your cost cent
- Receive Goods and Services**  
Here you can receive or reject purchase order line items

1. Detail into Requisition to view purchase information

2. Check Box to Approve

3. Select "Submit"

The screenshot shows the 'Approve Documents' page. At the top, there is a breadcrumb trail: 'Daily Work > Financial Management > Approve Documents'. Below this is the 'Approve Documents' header. The main content area is divided into sections: 'Requisitions', 'Purchase Orders', 'Vouchers', and 'Journal Entries'. The 'Requisitions' section contains a table with the following data:

Approve	Next Approver	Requisition / Vendor	Date	Total	Override Budget?
<input checked="" type="checkbox"/>	<input type="text"/>	<a href="#">0000020</a> Amazon.com, Inc.	11/25/2020	\$650.00	<input type="checkbox"/>

Below the requisition table, there are three sections: 'Purchase Orders', 'Vouchers', and 'Journal Entries', each with a message: 'There are no [purchase orders/vouchers/journal entries] that require your approval.' At the bottom right, there is a blue 'Submit' button.

In the box you can see who has already approved the document, they are indicated with a **green check mark**. The next required approvers are listed here. If there is a plus sign after a name, it means anyone listed as next can approve the document to move it along.

The screenshot shows the 'Approve' tab of the 'Approve Documents' page. It displays a requisition for 'CDW Government' with a date of '3/20/2025'. The requisition ID '0000091' is highlighted in blue. Below the requisition information, there is a list of approvers: 'Melaine Kenyon - VP/CIO' (with a green check mark and a '+1' icon) and 'Diana Chamberlain - Acct Superviso' (with a yellow triangle icon). A large yellow arrow points from the 'Approve' tab to the list of approvers.

You can drill down on any item that is in **BLUE** for more detail

## Approve Documents

Approve History

### Requisitions

Approve/Return	Next Approver	Requisition / Date / Vendor	Approvers / Next Approvers
<input type="checkbox"/> <a href="#">Next Approver Lookup</a>		<b>0000091</b> 3/20/2025 CDW Government	<span>✓</span> Melaine Kenyon - VP/CIO <span>+1</span> <span>⚠</span> Diana Chamberlain - Acct Superviso <span>+1</span>

#### Requisition Details

[0000091](#)

Overview Approvers Line Items

**Status** Not Approved

**Vendor** 0129136 CDW Government

**Amount** \$3,840.00

**Maintenance Date** 3/20/2025

**Initiator** Melaine Kenyon

**Requestor** Melaine Kenyon

**Attachments** [View 1](#)

**Additional Details** ▼

Printed Comments

Internal Comments

### Purchase Orders

There are no purchase orders that require your approval.

### Vouchers

There are no vouchers that require your approval.

### Journal Entries

There are no journal entries that require your approval.

The next screen enlarges the detail from the drill down:

By selecting VIEW, you can download a PDF of the attachment for review of the quote, proposal or other backup

### Requisition Details

0000091

Overview | Approvers | Line Items

**Status** Not Approved

**Vendor** 0129136 CDW Government

**Amount** \$3,840.00

**Maintenance Date** 3/20/2025

**Initiator** Melaine Kenyon

**Requestor** Melaine Kenyon

**Attachments** [View](#) 1

**Additional Details**

**Request Date** 3/20/2025

**Status Date** 3/20/2025

**Desired Date**

**AP Type** CC Credit Card

**Ship To** DC Daemen University - Mailroom

Printed Comments

### Attachments

Name	Uploaded On	Actions
PJKD422.pdf	3/20/2025 11:33:27 AM	

Close

Drill down on arrow to see a copy of the quote **QUICK TIP:** you can download multiple pdfs to your downloads drive, select them all and right click to open all at once.

Here you see who has already approved the document and then who is the next level approver. Any individual listed next can approve the document. Often, there is more than one person listed so the item does not get caught in the system when someone is out.

If a person has more than one approval level, they will only be required to approve the document once, to cover all their approval roles.

For example: Grants, fixed assets, business office staff- Steve would only have to approve at one of these levels for it to be approved for all the roles he has.

provers / Next Approvers	
Melaine Kenyon - VP/CIO (+1)	Diana Chamberlain - Acct Superviso (+1)

Requisition Details	
<a href="#">0000091</a>	
Overview	Approvers
Approvers	Approval Date
✓ Melaine Kenyon - VP/CIO	3/20/2025
✓ Chris Pack	3/20/2025
⚠ Diana Chamberlain - Acct Superviso	Awaiting Approval
⚠ Lisa Arida - Controller & Treas	Awaiting Approval

Requisition Details ✕

[0000091](#)

Overview   Approvers   **Line Items**

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← Back to Line Items

**VEEAM DATA CLOUD VAULT ADV SUB 1Y VEEAM DATA CLOUD VAULT ADVANCED FOR AZURE. 1 TB. 1 YEAR SUBSCRIPTION** **\$3,840.00**

**Quantity** 20

**Unit**

**Price** \$192.0000

**GL Account**

^ 1-351015-51536  
Academic Computing : Software

**Item Code**

**Quantity** 20

**Amount** \$3,840.00

Remaining Balance \$162,613.11 ☰

**Vendor Part**

**Desired Date**

**Line Item Comments**

Requisition Details ✕

[0000091](#)

Overview   Approvers   **Line Items**

	Description	Extended Price
1	VEEAM DATA CLOUD VAULT ADV SUB 1Y VEEAM DATA CLOUD VAULT ADVANCED FOR AZURE. 1 TB. 1 YEAR SUBSCRIPTION	\$3,840.00

By drilling down on the line item, you can see budget number, name and remaining Balance. If you want additional details regarding the budget, you can drill down on the three lines to see the details below

If the line item is over budget, you will still be able to process/approve the request.

Remaining Balance	
1-351015-51536 Academic Computing : Software	
<b>Budget</b>	\$441,350.00
<b>Expenses</b>	\$270,396.89
<b>Encumbrances</b>	\$0.00
<b>Requisitions</b>	\$8,340.00
<b>Remaining Balance</b>	<b>\$162,613.11</b>
Close	

After reviewing the backup, the budget number and any other relevant information, you are ready to APPROVE the document by checking the box and hitting submit.

Requisitions

Approve/Return	Next Approver	Requisition / Date / Vendor	Approvers / Next Approvers	Total	Override Budget?
<input checked="" type="checkbox"/>	<input type="text" value="Next Approver Lookup"/>	0000091 3/20/2025 CDW Government	Melaine Kenyon - VP/CIO (+1) Diana Chamberlain - Acct Superviso (+1)	\$3,840.00	<input type="checkbox"/>

Purchase Orders

There are no purchase orders that require your approval.

Vouchers

There are no vouchers that require your approval.

Journal Entries

There are no journal entries that require your approval.

## Approve Documents

[< Back to List](#)

Approve History

### Approval Confirmation

The following documents were updated or created.

Document Type	Document	Message
Requisition	<a href="#">0000091</a>	Additional approvals are required.

The following documents were not updated.

Document Type	Document	Message
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The requestor will also receive an email that their request has been approved.

Reasons to RETURN to requestor:

1. The wrong budget number is charged.
2. The date (fiscal year) is wrong.
3. The amount is wrong.
4. Backup is inadequate.
5. The wrong vendor is used.
6. A quote CANNOT be submitted as a payment request.

## Approve Documents

Approve History

### Requisitions

Approve/ Return	Next Approver	Requisition / Date / Vendor
<input checked="" type="checkbox"/>	 <input type="text" value="Next Approver Lookup"/> 	<a href="#">0000091</a> 3/20/2025 CDW Government

The original requestor is the only one who can change the budget number.

If the request is not an authorized expenditure, it can be returned with instructions to void. If the Vendor is wrong, it must be returned, voided and re-entered with the correct Vendor

The Arrow below indicates that you want to RETURN the request.

In the history section, you have a record of ALL Documents you have approved. If someone else approves them, you will not be able to see them. You can also look for past documents using the filter. IE: By date, vendor, etc.

## Approve Documents

Approve **History**

Filter

## Requisitions

Requisition	Approvers
<a href="#">0000077</a> 3/7/2025 <span>PO Created</span> Performance Health Supply, Inc.	✓ Lisa Arida - Controller & Treas 3/7/2025 (+3)
<a href="#">0000076</a> 3/6/2025 <span>PO Created</span> One Identity	✓ Lisa Arida - Controller & Treas 3/6/2025 (+2)
<a href="#">0000091</a> 3/20/2025 <span>Not Approved</span> CDW Government	✓ Lisa Arida - Controller & Treas 3/20/2025 (+2) ⚠ Diana Chamberlain - Acct Superviso (+1)
<a href="#">0000079</a> 3/11/2025 <span>PO Created</span> CrashPlan Group LLC	✓ Lisa Arida - Controller & Treas 3/12/2025 (+3)

Notes: Submissions with an invoice, do not have to be rejected and resubmitted as a payment request. They would require PO that purchasing would accept immediately and forward for AP to issue the check.

Requisitions and payment requests cannot be saved, but vendors that require weekly, monthly, or quarterly, or other frequent payments can be set up as Blanket Purchase Orders or Recurring Purchase Orders with multiple items for the same amount. See next page for further information.

## **What are the advantages of Blanket Purchase Orders & Recurring Purchase Orders**

The benefits of these types of requisitions:

They only need to be approved one time

They only have to be input once

AP and purchasing do not need to contact the initiator for payment processing when the invoice comes in

If you want to approve prior to payment then you would use a purchase order that uses the acceptance tile

### **Blanket Purchase Order (BPO)**

This will encumber the funds for the whole year (period)

Used for input of an annual amount where the amounts could vary (could be any number of payments)

Used for weekly, monthly, quarterly, etc. invoices that do not change and no further approval or acceptance are required

### **Recurring Purchase Order: weekly, monthly, qtrly invoices that require approval.**

This will encumber the funds for the whole year (period)

Used for monthly invoices that do not change, but approval or acceptance is needed

Input one line item

No additional acceptance required, goes directly to AP for payment when invoice comes in

QTY: 12  
\$12,000

Monthly invoices

\$1,000

A copy of the contract should be attached or other relevant documentation must be attached for approval reference

MUST accept the invoice every month in order to process payment when invoice comes in

A copy of the invoice will be uploaded at the time of payment

A copy of the contract should be attached or other relevant documentation must be attached for approval reference

If you choose this method, indicate that you would like a Blanket Purchase order created for the recurring payments related to this requisition request in the INTERNAL COMMENT SECTION of the requisition.

A copy of the invoice will be uploaded at the time of payment

If the amount is not sufficient, an additional requisition can be added to procurement at a later date to make up the difference. A note will have to be included to add to the existing Blanket Purchase Order (BPO)

In the event the monthly invoice changes, the outstanding purchase order can be updated.