This guide covers instructions for uploading Documentation for your ARC transactions using the Procurement Documentation Application.

Uploading Documentation

1. Go to <u>https://forms.finance.columbia.edu/edm/</u>. The Procurement Document Application opens.



Welcome to the Procurement Documentation application. In order to upload documents to Procurement, or to check the status of a current order or request, please choose one of the tabs above.

 Select the module under which the transaction falls: Purchasing for requisition related documents, Accounts Payable for voucher-related documents, or Journal Entries for General Ledger documents. Vendors submitting Supplier Profiles select Vendor Management.

OR

From **ARC**, within your Requisition or Voucher, click **Procurement EDM** from. The relevant Upload screen for your transaction appears after you login to the Procurement Documentation Application. You can then skip to step 5.

3. Log in with your UNI and Password.



Depending on the module you selected, a Search screen or Upload screen appears. If you selected Purchasing or Accounts Payable, you will need to search for the Requisition, Purchase Order, or Voucher for which you are uploading documentation.

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4. Enter the appropriate **Requisition Number**, **PO Number**, or **Voucher Number** from your ARC transaction and click **Search**.

The Upload page for your transaction appears. The status of the transaction appears in the header and any previously uploaded documentation is listed.

leader			
Requisition Number	0000138823		
PO Number	0000127839		
Vendor Name	MCKESSON MEDICAL - SURGICAL INC.		
Commodity Group	Medical & Dental		
Sole Source	No		
Funding Source	Non-Sponsored		
UwPA	No		
Total Value	\$453.56		
Purchasing Contact Info	Michael Reich, Email: mmr62@columbia.edu, Phone: +1 212 854 2337		
Current Status	PENDING DISTRIBUTION		
Document rearing		Number Nemaining	
PUR - Quote / Proposal - Awa	rded (ARC)	1	
PUR - Quote / Proposal - Awa Click here for a matrix of additio	rded (ARC) nal required documents for this purchase.	1	
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5. Select the Number of Documents to Upload.

New Documents	
Number of Documents to Upload * 2 1	Ç •
Dropdowns and buttons appear co	prresponding to
the number you selected. Repeat s below for the number you selected	teps 6 and 7 1.
Number of Documents to Upload *	
- Select -	Choose File No file chosen
- Select -	Choose File No file chosen

6. Select the **Document Type** you are uploading from the dropdown.

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Uploading Documents into the Procurement Documentation Application



7. Click **Choose File** and browse the search window to select and **Open** your document file.



8. Click Upload Documents.

Getting Help

http://finance.columbia.edu/content/finance-servicecenter

You can log an incident or request a service via Service Now

https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122