Frequently Asked Questions

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Introduction to System

How do I download the application / software to my computer?
COMPASS (SciQuest) is a web based module. The system can be accessed through any internet web browser.

What is the link to the COMPASS login page?
https://solutions.sciquest.com/apps/Router/Login?OrgName=StateOfColorado&UR

What web browser should I use?
COMPASS can be used with Internet Explorer, Chrome, Safari or Firefox.

Does this new process replace OIT's 10k process?
Yes.

Will this system be replacing COFRS?
No, COMPASS is an electronic requisition workflow tool for IT related products and services.

Users in the system

Who can request a new user in the system?
Your Department Purchasing Director or Manager can authorize the addition of new users by emailing DPA_compasshelp@state.co.us

What happens if I forget my password?

> If you have not set up a security question: *Email the COMPASS help desk at DPA_compasshelp@state.co.us, and ask for your password to be reset*

> If you have set up a security questions: *On the bottom of the login page, click the "forgot your password". Enter your username and email address; the system will then email instructions on how to reset your password.*

What role do I have in the system?
You can either be a shopper, a requestor, or an approver. Once logged in, you can navigate to "Profile" and then to the "Rles" tab to view your access or contact the COMPASS helpdesk for clarification of your personal role.

What is the difference between a shopper and requestor?
A shopper can build a shopping cart, but can only assign it to a requestor.
A requester can build a shopping cart <u>and</u> submit the requisition into the workflow.

How do I setup favorite Ship-to and bill-to addresses?
From the main-menu, click the "Profile" tab, then click the "Purchasing" Tab, then the "Addresses" sub-tab.

What is the maximum # of favorite accounting code strings an individual can set up?
There is no limit in place at this time.

How do I edit my email preferences?
To customize your email settings; select "Profile" then the "User Settings" tab. Finally click the "Email Preferences" tab and change accordingly.

Can I customize my tabs?
Yes. On the toolbar to the far right click on the dropdown box that says "more>>" and then select "customize."

Requestors

Where can I manage my favorite accounting codes?
From the main menu, click "Profile" (top-left of page next to your user name), next click the "purchasing" tab, and finally click the "code favorites" tab.

Is the IT Request Form only to be completed for IT related purchases or all purchases?
Only IT related purchases are required to be entered in Compass. To access more information regarding IT related purchases, http://www.colorado.gov/dpa/forms/oit/oitexp10k.htm

What commodities / items need to be requisitioned?
Specific requisitioning do's and don'ts can be found at:
http://www.colorado.gov/dpa/forms/oit/oitexp10k.htm

Can I enter a negative number for the dollar amount? For example, if I was trying to utilize a credit?
No, negative dollar amounts cannot be entered in COMPASS.

If the vendor I need is not in the system, what should I do?
Vendor / supplier information is pushed from COFRS daily. As changes / updates are made to the vendor database in CORFS; changes should be uploaded into COMPASS. If a vendor cannot be found in the system, please contact the COMPASS Help Desk.

Once an item has been added to a shopping cart can it be edited?
Yes, go to the shopping cart and select the item you wish to edit, and then follow the prompts.

Is there a dollar limit to use this system?
No, any amount can be requested in this system, follow guidelines available here:
http://www.colorado.gov/dpa/forms/oit/oitexp10k.htm

Who assigns or creates the requisition numbers?
COMPASS automatically assigns a system generated requisition number.

What is the "Name your Shopping Cart" function?
*A cart name is a way for users to organize requisitions, and to quickly refer back to them in the future. For instance if you were buying a yearly lot of computers, you might name that cart "**2013 computer purchases**"*

What happens if two items have different accounting strings?
Multiple accounting strings can be entered by splitting the purchase amount by $ or %.

Once OIT approves my requisition, what happens next?
The final approval step from OIT (Procurement determination) is the determination of whether OIT or the requesting department will proceed with the procurement. An email is sent to the original requestor and the department Procurement Office upon final approval of the requisition.

Does the system automatically place my order with the vendor?
No, since COMPASS is only used for requisitioning, the order will still need to be place in the same manner as before (purchase order, p-card purchase, etc…)

Can I cancel an order after it has been submitted into the workflow?
Requestors can withdraw a requisition from the workflow if it is still pending. Click on the Carts tab, then select "My Requisitions" and finally click on the requisition you would like to withdraw. In the upper right corner of the page under the "Available Actions" dropdown box select "Withdraw Entire Requisition" and it will be removed from the workflow.

How long will my requisition stay in COMPASS?
Your requisition, no matter the status, will stay in COMPASS indefinitely, and will always be searchable and viewable.

Approvers

How is approval for a given requisition decided?
Approvers have been assigned to certain accounting codes (Org, Agency, Appropriation, etc…) by leads within their departments. As Requestors use given accounting codes, the respective approver(s) is automatically assigned approval authority on that requisition.

Can approvers modify a requisition?
No, only a requestor can modify a requisition. If an approver requires a modification they must add comments and/or return the requisition back to the originating requestor.

How do I approve a requisition?
From the Home Page, click on the "Approvals" tab. From this page approvers are able to select within a given requisition by clicking the requisition number (on the left hand side).Finally from the drop down select "Approve/complete step" and click the GO button.

How do I approve requisitions directly from my e-mail?
First, email approval codes need to be set up by clicking "Profile" from the main page and editing the "Email Approval Code" field in the "User Identification" tab. From this point forward, approvers will have the ability to approve from their email notifications by clicking the approval button in the email, and then entering in the Email Authorization Code.

Is there a deadline to take action (Approver, Reject, ect…) on a requisition?
No, requisitions will stay open as long as approval is needed on a given step. However, approvers will receive email notifications reminding users that approval is still needed.

How do I return/ reject a requisition?
From within the requisition, select the "Assign to myself" option from the dropdown in the top right hand area. The screen will refresh, and you will have more options under the dropdown. Of which "Return" and "Reject" should now be available.

If I reject a line item can I still approve the rest of the requisition?
Yes, the requisition will continue through the workflow without the specific item that was rejected.

Does the system send an error for using the wrong accounting code?
Account code value relationships mirror the setup in COFRS. If an account code used in a given requisition does not have an approver assigned, an error message is triggered and forwarded to the COMPASS help desk for resolution.

Can attachments be accessed directly from an approval email notification or comment email notification?
No, attachments and documents can only be viewed by logging into COMPASS.

Are there multiple levels of approval or am I the only level of approval?
The number of approval levels vary by department. The majority of departments have the following approval workflow:
1. *Business Line Approval*
2. *Accounting/Budget Line Approval*
3. *OIT Approval*
4. *OIT Determination of Purchasing Party*

Tracking and notifications

How do I monitor the progress in the workflow?
Once the requisition has been submitted into the workflow, users can search for a requisition. Select the corresponding requisition and then click the "PR Approvals" tab to see the current step of the approval process.

How can I review a requisition that has already been submitted or approved?
Click the tab entitled "document search". Here users are able to define a search query by selecting the appropriate options in this menu and then clicking the "GO" Button located either at the top or the bottom of the page. This will generate a report with requisitions within your search parameters.

Will I be notified by an automated email when there is an update/change/new request?
There are email notifications available. You can always personalize which emails you want to receive under your profile settings.

Report Generation

Can I generate search queries and reports on COMPASS Requisitions?
*Yes, Users may generate query based reports on requisitions from their department. To do so, click the **Document Search** tab, and toggle between a **Simple Search** and an **Advance Search** by clicking the respective link on the right side within the tab. Specify any search criteria by utilizing the filters and, finally click the **Go** button at the top or bottom of the page to generate the report.*

Can I filter my queries further once a report has been generated?
Yes, once a report has been generated, additional search filters can be found on the left hand side in the reports page. Click a given search filter and the report will automatically update.

Can I sort my report by ascending or descending values?
*Yes, from the **Sort By** dropdown (located at the top center of the report), select the value in which you would like to sort by.*

Can I export my search to excel?
*Yes, once a report has been generated, identify the button **Export Search** (located in the upper left hand side of the body). By clicking this button a sub-window will populate. Provide a name for the export and select a type of export from the drop down (Screen, Transaction, or Full). After the **Submit Request** button has been clicked, navigate to the **Exports** tab on the reports page to download your export.*