

TO: Self-Service Requisitioners and Approvers

FROM: Kim Van Lew, Helen Loori, and Information Technology

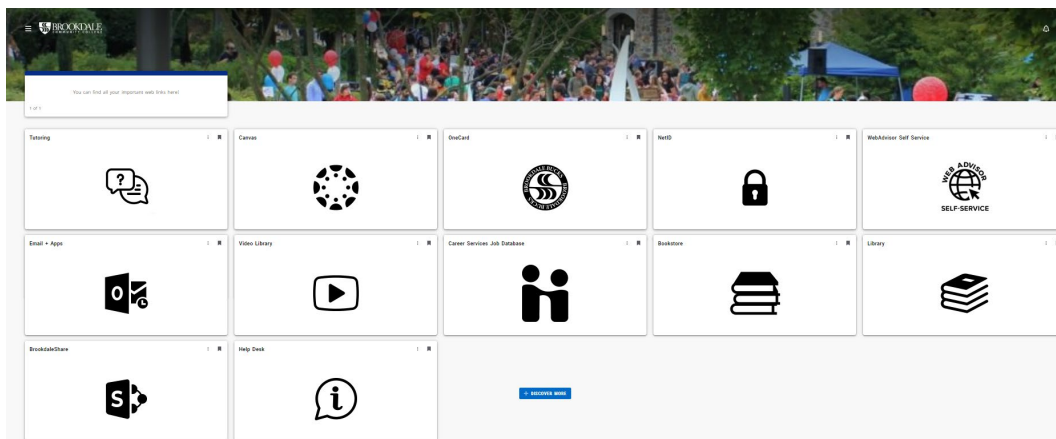
SUBJECT: Transition WebAdvisor (WA) to Self-Service (SS) Procurement

DATE:

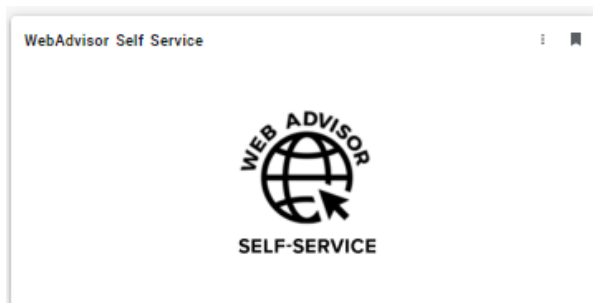
WebAdvisor (WA) will be sunsetting at the end of June. In preparation for this transition, IT will open the test account today to give everyone the opportunity to check it out before July 1. **After July 1, WA will not be available for procurement; SS will become the requisition tool.**

To log in to use the following link:

<https://experience.elluciancloud.com/bcc332>




Click on Self-Service:



Click on Budgets, Reqs, & POs for navigational tips and information for easy access for both requisitions and approvals.


Hello, Welcome to Colleague Self-Servi...

Choose a category to get started.




Student Finance

Here you can view your latest statement and make a payment online.




Financial Aid

Here you can access financial aid data, forms, etc.




Tax Information

Here you can change your consent for e-delivery of tax information.




Banking Information

Here you can view and update your banking information.




Student Planning

Here you can search for courses, plan your terms, and schedule & register your course sections.




Course Catalog

Here you can view and search the course catalog.




Grades

Here you can view your grades by term.



Graduation Overview

Here you can view and submit a graduation application.




Budgets, Reqs, & POs

Here you can view the financial health of your cost centers and your projects.


Click on Procurement

Financial Management Overview




Approve Documents

Here you can approve a list of financial documents.




Budget to Actuals

Here you can view the financial health of your cost centers.



Finance Query

Here you can query your financial data.



Procurement

Here you can create and maintain your procurement documents.

Notice the landing page (next page) **NOTE:** If you created an E-Req and the cost center was changed to something you do not have access to, you will not be able to view the details.

In the **VIEW** mode the Procurement home screen displays Requisitions and Purchase Orders.

View

Create

Filter

Procurement Documents Filter

Collapse All

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
5/19/2022	0021177 Not Approved	\$2.50	
5/11/2022	0021172 Outstanding 0455812 W.B. Mason Co., Inc.	\$2.00	✓ Helen Loori
5/4/2022	0021170 Outstanding 0455812 W.B. Mason Co., Inc.	\$62.99	✓ Helen Loori

⏪

⏩

Page 1 of 1

⏪

⏩

Per Page: 10

Total: 3

Purchase Order

Purchase Order Date	Purchase Order	Total	Approvers/Next Approvers
3/16/2022	P0084410 Outstanding 0489056 KT's Office Services	\$125.00	✓ Matthew Siuzdak(Finance ED)
11/11/2021	P0083810 Outstanding 0706390 NW Financial Group, LLC	\$2,000.00	✓ Matthew Siuzdak(Finance ED) +1

Filter button in **View** provides search criteria options. Click on Filter for the options, click again to collapse.

Procurement

View

Create

Filter

Document Types: Requisition, Purchase Order, Payment Request

Document Type

Requisition X

Purchase Order X

Payment Request X

Vendor

Amount

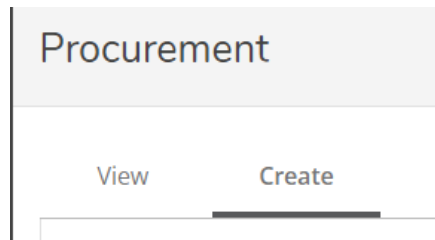
Date Range

Status

Note: You can also Filter by clicking the blue X to the right of the document type to close out of what you do not want to see. Once you have clicked the X(s), click apply filter.

To Create a Requisition:

Click on the **Create** under Procurement to begin creating a requisition.



Notice the new look to the E-Req creation page.

Type your last name in the Initiator search box and click on it. It will appear underneath the Initiator box. Type your email address. Type the Vendor name in the vendor ID lookup search box. The system will provide all the options in a drop down for selection (try it!).

A screenshot of the "Create" page for requisitions. The page has a light gray header with "Procurement" and two tabs: "View" and "Create", with "Create" being the active tab. The form contains several fields: "Document Type *" with a dropdown menu showing "Requisition"; "Requisition Date *" with a date input field showing "05/19/2022"; "Initiator" with a search box containing "Initiator Lookup" and a magnifying glass icon; a dropdown menu showing "Helen Looi"; "Confirmation Email Address *" with a text input field containing "hloori@brookdalecc.edu"; a note "Add email addresses separated by commas"; "Ship To *" with a dropdown menu showing "LR Brookdale Community College"; "Desired Date" with a date input field showing "MM/DD/YYYY"; and "Vendor ID" with a search box containing "WB Mason" and a magnifying glass icon. Below the search box, a dropdown menu shows two vendor options: "W.B. Mason Co., Inc. 0455812 535 Secaucus Rd Secaucus Nj 07094 (PO-Purchase Order Address)" and "William R. Mason 0027309".

Click or strike the enter key to select the vendor of choice

As in WA, do not enter the Next Approver name until the E-Req is final and no additional changes will be made. The Approver(s) will get an email every time the E-Req is edited and submitted.

Enter comments – both Printed and Internal.

Note: Printed Comments appear on the PO; Internal Comments are used to communicate information to the Purchasing Department.

AP Type

AP22 ACCOUNTS PAYABLE-OPERATING BOA

Approvers	Approval Date
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Next Approvers

Next Approver Lookup

Printed Comments

location

Room number

cke (if a check needs to go with the PO i.e., memberships or registrations often require payment with the renewal.

Internal Comments

These are comments for purchase in - emailing quote, or special instructions for processing -call XXX at 000 to pick up the check etc.

Click on Add Item

Items

Line	Description	Vendor Part	Quantity	Unit	Price	Extended Price	
Items							

Add Item

Cancel

Save

Reminder: Do not add the Next Approver until you have finished adding to and reviewing your requisition. When entering the Approver information, SS will search the Next Approver by last name. You may add as many as needed. The system will generate emails to every name you add once you submit the requisition.

Printed Comments contain the same information as they did in WA; Requisitioners should enter their information as follows:

E-req # -- 12345

Jane Smith -- *User Name*

Finance --*Department*

BAC -- *Building*

Room 228 -- *Room number or location for delivery*

Click on **Add Item**:

Items

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price	
------------	-------------	-------------	----------	------	-------	----------------	--

[Add Item](#)

The Description Field is not limited – type your item description. Include part numbers, dates of conferences, names of attendees., i.e., any relevant information that should be stated on the Purchase Order's Description Field.

New Item

Description *

There is no limit to the description in SS. Please keep it clear and simple. Description and item number for processing.

Vendor Part

Leave blank

Quantity *

5

Unit

EA each

Price

0.5000

Extended Price

\$2.50

GL Account *

Search by GL Account...



Quantity

5,000

Percent

100.000

Amount

2.50

GL is a general ledger lookup and requires that you enter your cost center – type in the number to get the drop down of the object codes available. **Never use an object code that starts with 505 (which is a payroll code).**

To add another item, scroll down and click Add item again and continue. If finished, click Save.

Go back to the to View option to view your document

Procurement

View

Create

[Filter](#)

[Collapse All](#)

Document Types: Requisition

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
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5/11/2022	0021172 Outstanding 0455812 W.B. Mason Co., Inc.	\$2.00	Helen Loori
5/4/2022	0021170 Outstanding 0455812 W.B. Mason Co., Inc.	\$62.99	Helen Loori

Click on the Requisition Number hyperlink to edit an unapproved requisition. Then again on the hyperlink or the pencil icon on the right side of the screen to edit.

Online-Fully Online: Sections designated as "Online -Fully Online" do not have a daytime meeting

Online-Remote Hybrid: Sections designated as "Online - Remote Hybrid" will include a mix of speci your search results) in which you will meet with your class and independent or smaller group work. Y the first day of classes, and specific guidance regarding the meeting and learning plan for your course

Course Information: Specific course type, and meeting day and time requirements are listed in the " results. Please check the course description for details regarding the meeting schedule for this hybrid

In Person: Course sections that meet In Person will include an on site location, such as Lincroft, with room information (for example, Larrison Hall 201 or MAS 217) will be viewable as these specific spac

Need help? Connect with us [here](#)

Academics

Procurement

View Create

Filter

Document Types: Requisition

Requisition Date	Requisition	Total
5/19/2022	0021177 Not Approved W.B. Mason Co., Inc.	\$2.50
5/11/2022	0021172 Outstanding 0455812 W.B. Mason Co., Inc.	\$2.00

[0021177](#) | [Delete](#)

Overview Approvers Line Items

Status Not Approved

Vendor

Amount \$2.50

Maintenance Date 5/19/2022

Initiator Helen Loori

Requestor Helen Loori

Attachments

Additional Details ▾

Printed Comments

These comments will appear on the PO or BPO - name location Room number cke (if a check needs to go with the PO i.e., memberships or registrations often require payment with the renewal.

Internal Comments

These are comments for purchasing - emailing quote, or special instructions for processing this will be split between two fiscal years, -call XXX at 0000 to pick up the check etc.

Notice the right side of the Requisition – Under Attachments click on Manage

Procurement

View Modify

Requisition Number 0021177

Status Not Approved

Initiator Helen Loori

Ship To * LR Brookdale Community College

Vendor ID [Vendor Lookup](#)

Requisition Date 5/19/2022

Status Date 5/19/2022

Confirmation Email Address * hloori@brookdalecc.edu

Add email addresses separated by commas

Desired Date

Attachments [Manage](#) 0

Approvers	Approval Date
Next Approvers	
<input type="text"/> Next Approver Lookup	

Printed Comments

These comments will appear on the PO or BPO - name location Room number cke (if a check needs to go with the PO i.e., memberships or registrations often require payment with the renewal.

Internal Comments

These are comments for purchasing - emailing quote, or special instructions for processing this will be split between two fiscal years, -call XXX at 0000 to pick up the check etc.

Attachments

×

Choose File

No file chosen

Upload

Clear

Accepted File Types: (.pdf,.jpg,.png,.gif,.bmp,.bm,.tif,.tiff)

Maximum File Size: (20 MB)

New feature: SS permits attachments – upload quotes, backup documents, pictures, etc. Click on Choose File to attach a document, then Upload to complete the process. *Acceptable document types include pdf, jpeg, png, gif, bitmap (bmp) bm. (No Word or Excel documents – see instructions to convert to pdf on last page.)

Once completed, add any additional information, save to update, and then return to the document to add the Next Approvers. The Next Approver lookup is by last name. As always, should you have issues please contact Purchasing or Finance.

To Approve a Requisition:

Click on the words Budgets, Reqs, and POs, at the top of the screen, then from the dropdown, Approve Documents. If there is anything in your queue, it will show up here.

Click the Requisition Number hyperlink and view the details. By clicking **Line Items**, the details are available, including the available balance.

Click to the right of the Remaining Balance to obtain the budget details. X out of the remaining balance and the Requisition details and click the Approve box in the left column, then Submit at the bottom of the page.

Requisition Details

×

0021178

Overview

Approvers

Line Items

< Back to Line Items

Test Pencils

\$1.00

Quantity

1

Unit

BX

Price

\$1.0000

GL Account

11-6-01-0600000-5150300

Academic Affairs : ADVERTISING

Item Code

Quantity

Amount

1

\$1.00

Remaining Balance

\$6,050.87

Desired Date

6/8/2022

Commodity

Trade Discount

Percent

Trade Discount

Amount

Fixed Assets

Line Item Comments

Remaining Balance

11-6-01-0600000-5150300

Academic Affairs : ADVERTISING

Budget

\$8,000.00

Expenses

\$1,738.00

Encumbrances

\$202.13

\$9.00

\$6,050.87

Approve Documents

Approve

History

Requisitions

Approve

Next Approver

Requisition / Date / Vendor

✓

Next Approver

🔍

0021178

5/20/2022

W.B. Mason Co., Inc.

After clicking Submit you will receive an approval confirmation on the Approve Documents screen.

The screenshot shows a web interface titled 'Approve Documents'. At the top left is a '< Back to List' link. Below the title are two tabs: 'Approve' (selected) and 'History'. The main content area is titled 'Approval Confirmation' and contains the text 'The following documents were updated or created.' Below this is a table with two columns: 'Document Type' and 'Document'. The table has one row with 'Requisition' in the first column and '0021182' in the second column.

Document Type	Document
Requisition	0021182

Remember – this is in the Test Environment. Please explore and let us know if you have any questions or issues. The College will launch the **LIVE site on July 1.**

As always, we appreciate your time getting familiar with this prior to the opening of the new fiscal year.

** To convert Word and Excel documents to PDF:*

Option 1:

File > Print > select printer “Microsoft Print to PDF” > Provide file name and location to save converted PDF file.

Option 2:

Click on File > Save As > Select a location > Save as type: PDF

