TO: Self-Service Requisitioners and Approvers

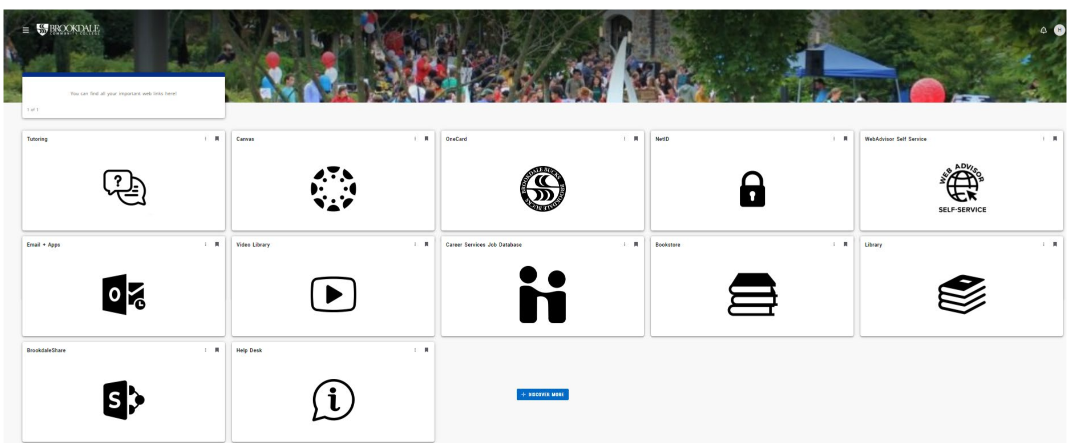
FROM: Kim Van Lew, Helen Loori, and Information Technology

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

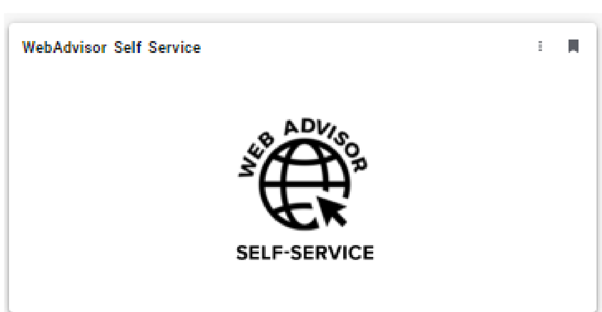
DATE:

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.**

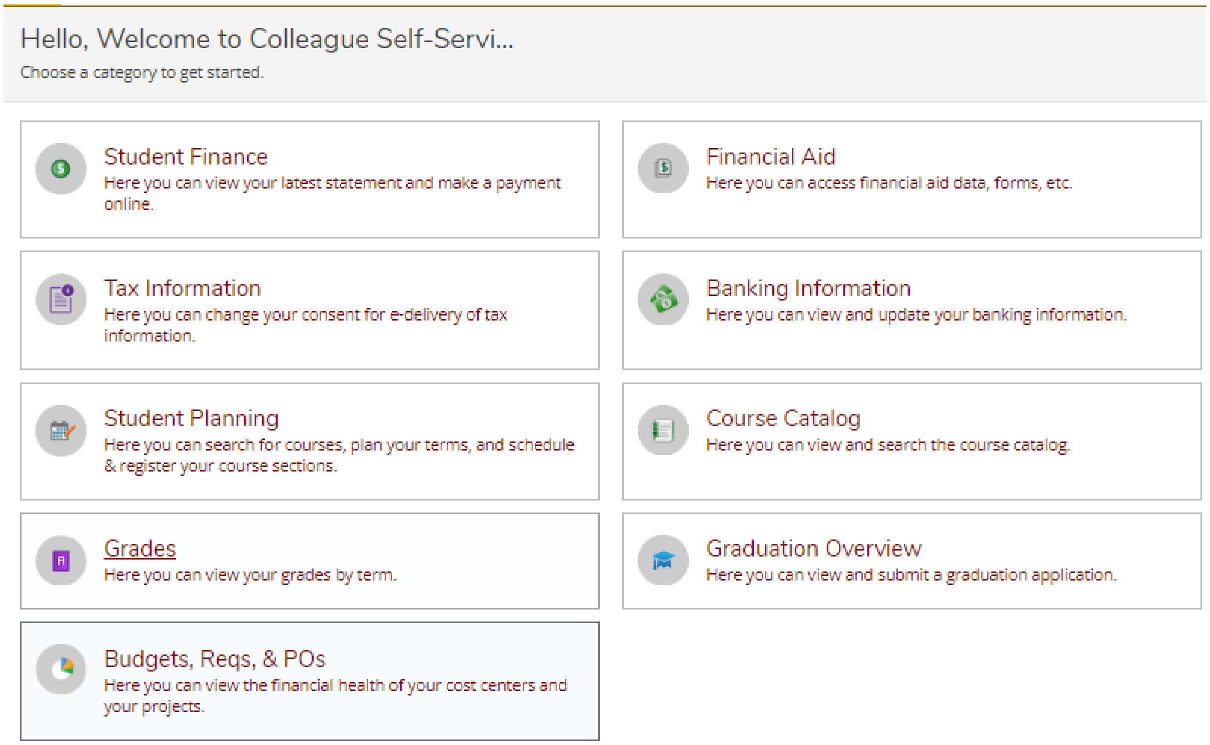
To log in to use the following link:
https://experience.elluciancloud.com/bcc332



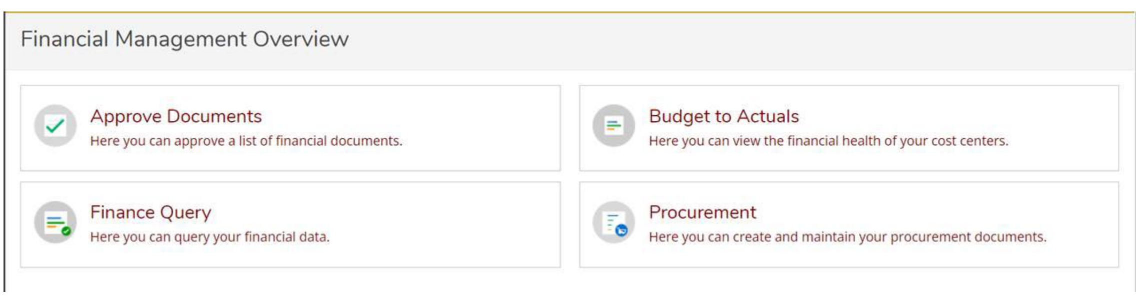
Click on Self-Service:



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

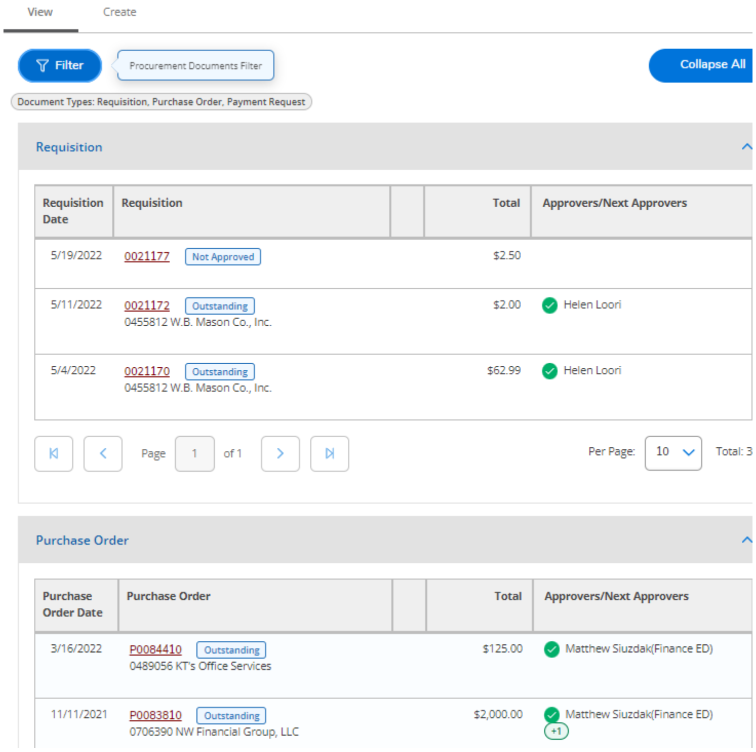


Click on Procurement

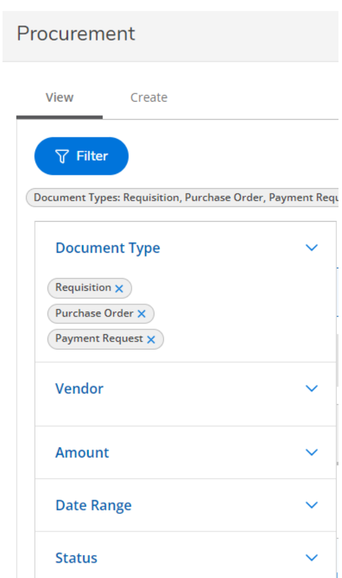


Notice the landing page (next page) **NOTE:** If you created an E-Req and the cost center was changed to something you do not have access to, you will not be able to view the details.

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



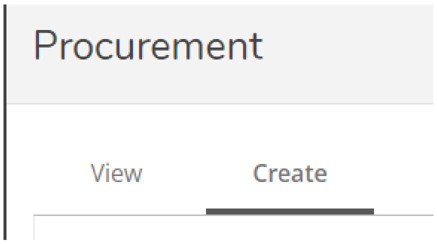
Filter button in **View** provides search criteria options. Click on Filter for the options, click again to collapse.



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.

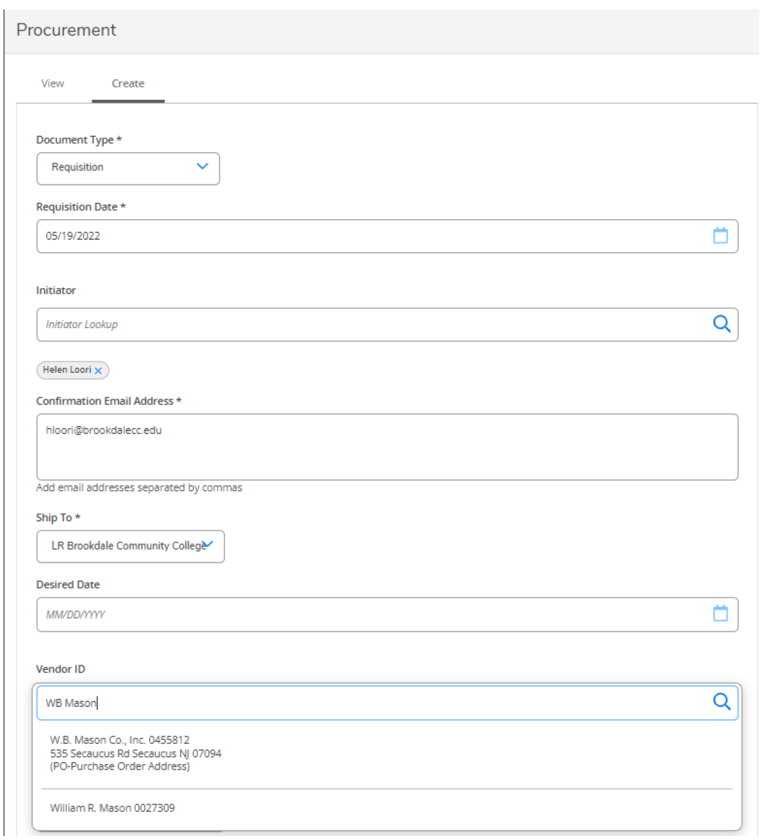
To Create a Requisition:

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 Vender name in the vendor ID lookup search box. The system will provide all the options in a drop down for selection (try it!).

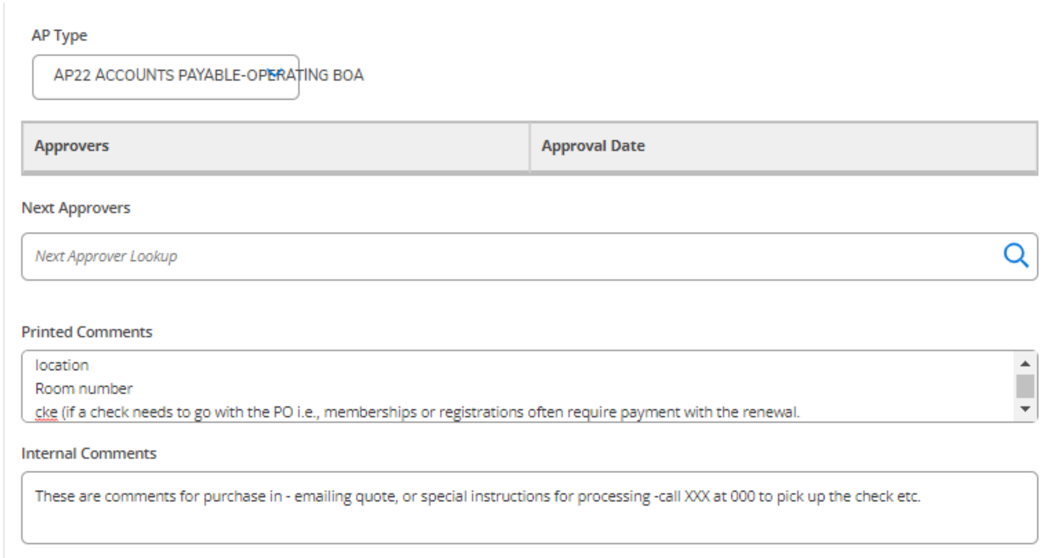


Click or strike the enter key to select the vendor of choice

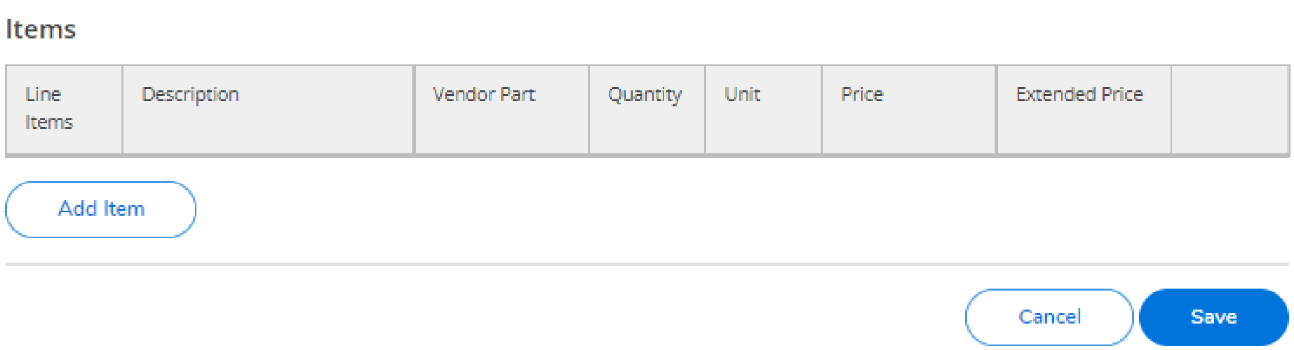
As in WA, do not enter the Next Approver name until the E-Req is final and no additional changes will be made. The Approver(s) will get an email every time the E-Req is edited and submitted.

Enter comments – both Printed and Internal.

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



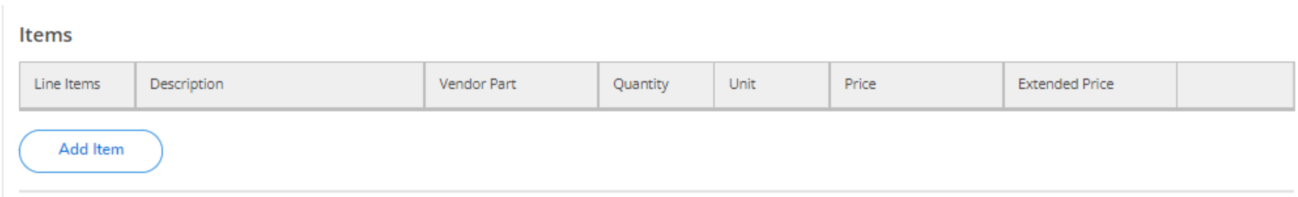
Click on Add Item



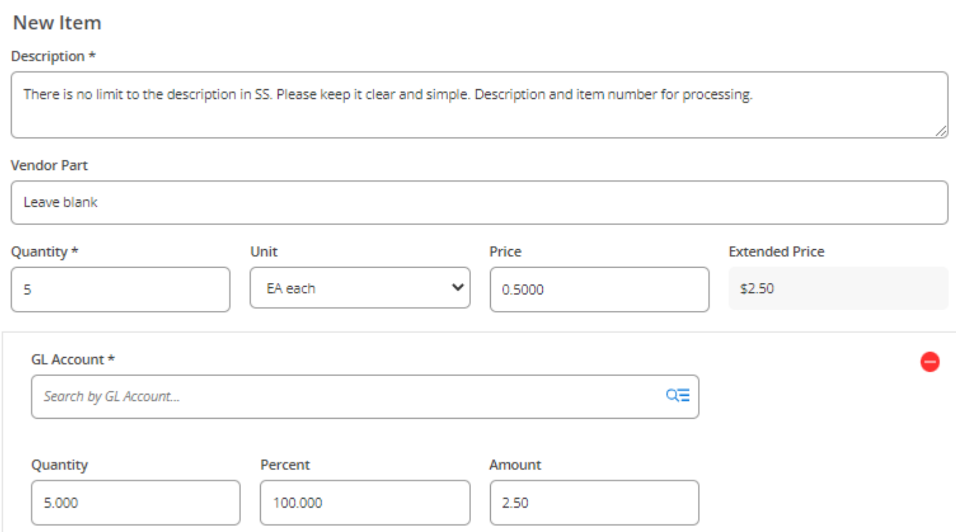
Reminder: Do not add the Next Approver until you have fished adding to and reviewing your requisition. When entering the Approver information, SS will search the Next Approver by last name. You may add as many as needed. The system will generate emails to every name you add once you submit the requisition.

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**:



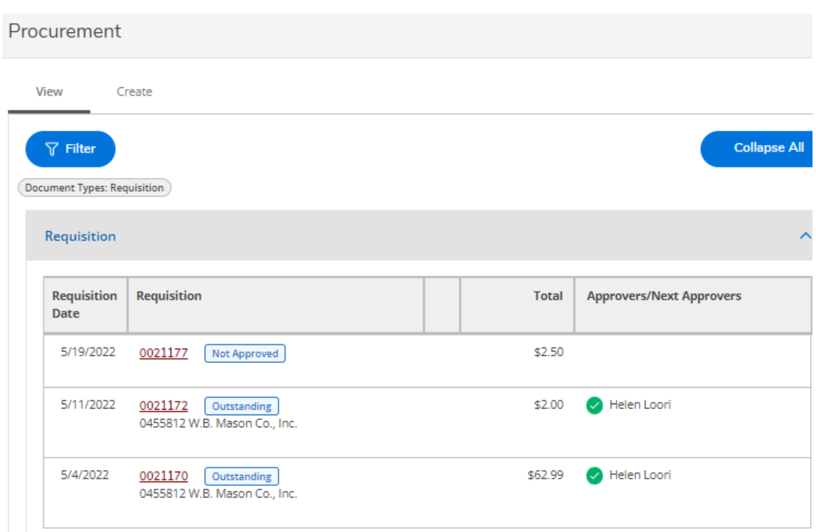
The Description Field is not limited – type your item description. Include part numbers, dates of conferences, names of attendees., i.e., any relevant information that should be stated on the Purchase Order's Description Field.



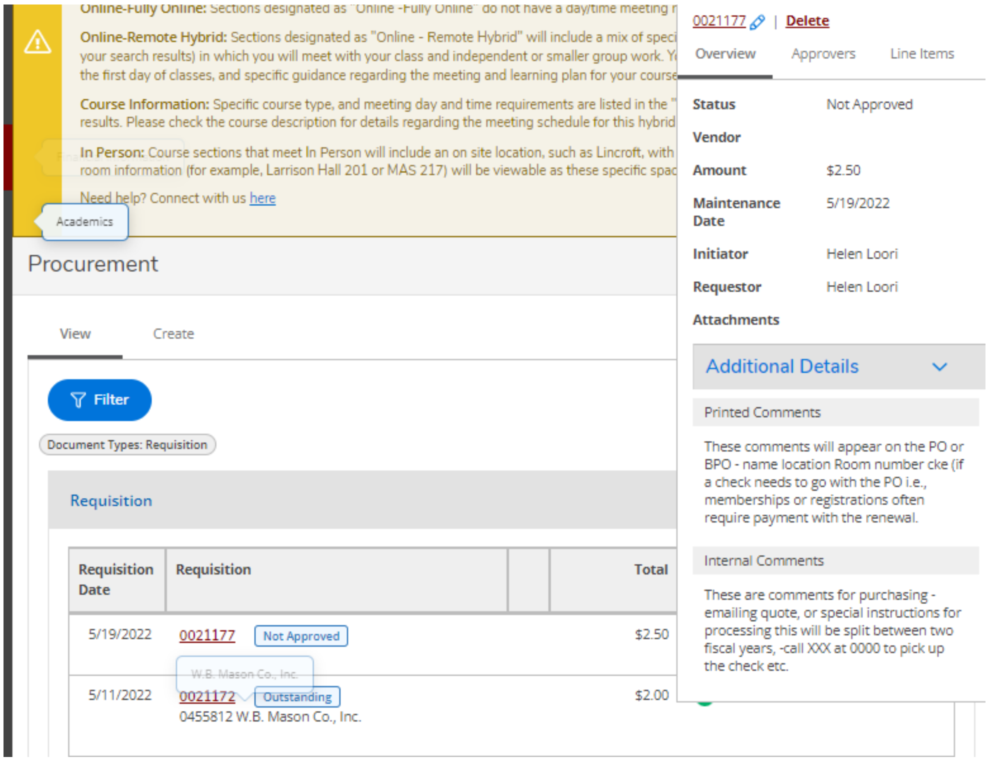
GL is a general ledger lookup and requires that you enter your cost center – type in the number to get the drop down of the object codes available. **Never use an object code that starts with 505 (which is a payroll code).**

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

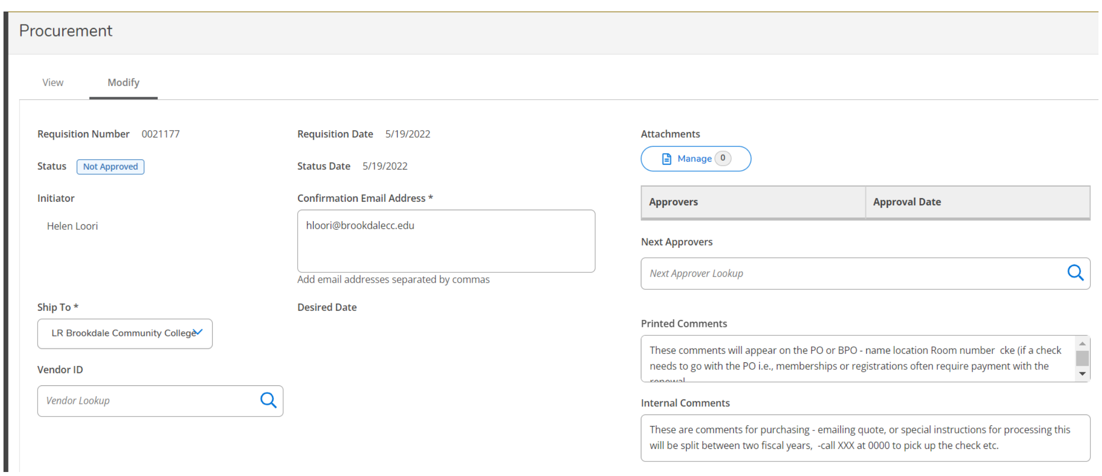
Go back to the to View option to view your document

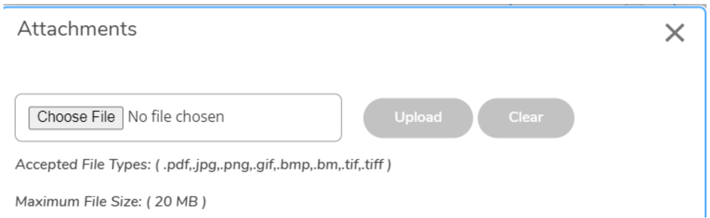


Click on the Requisition Number hyperlink to edit an unapproved requisition. Then again on the hyperlink or the pencil icon on the right side of the screen to edit.



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





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.)*

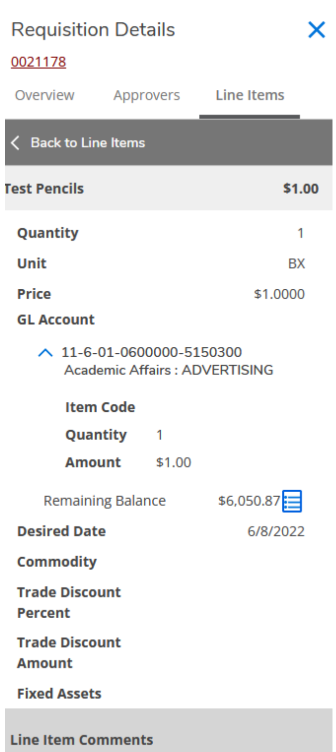
Once completed, add any additional information, save to update, and then return to the document to add the Next Approvers. The Next Approver lookup is by last name. As always, should you have issues please contact Purchasing or Finance.

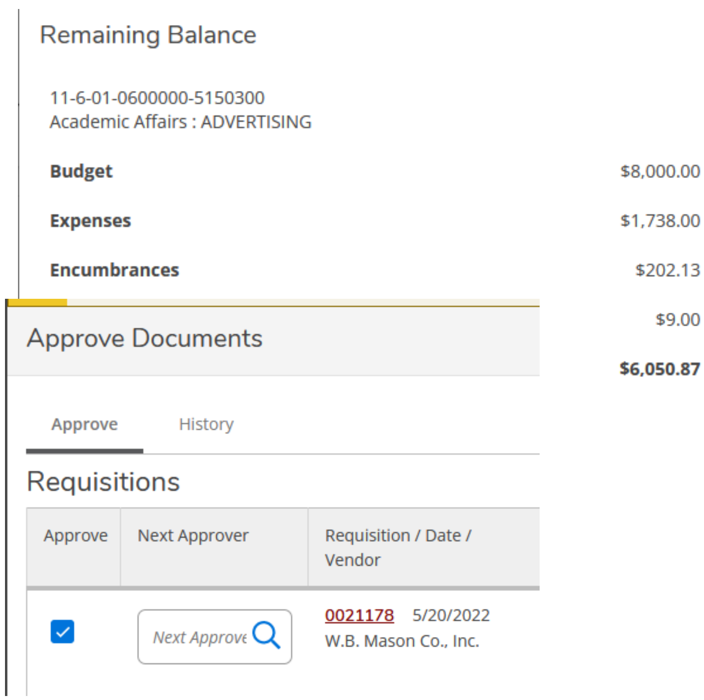
To Approve a Requisition:

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.

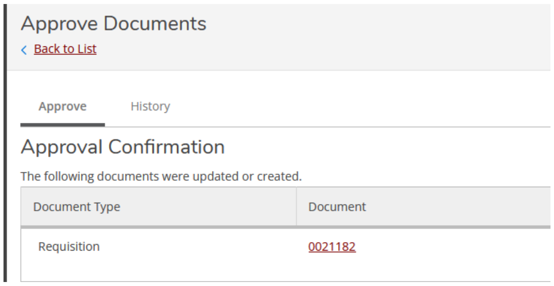
Click the Requisition Number hyperlink and view the details. By clicking **Line Items**, the details are available, including the available balance.

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.





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



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