

# **BRISTOL**

COMMUNITY COLLEGE



## **Self Service Banner Online Procurement**

### **Create a Purchase Order Requisition**

Paula Mourato ext. 3238  
Sue DeCoste ext. 3337

## Create a Purchase Order Requisition in Self Service Banner

### When to use a Purchase Order (PO):

- A PO serves as a legal binding contract with vendor and formalizes all the terms and conditions of a transaction; such as requested item(s), delivery schedule, quantity, and price. The Purchase Requisition Worksheet below can be used to gather order information. The fillable form is available on the S Drive.
- Encumber funds

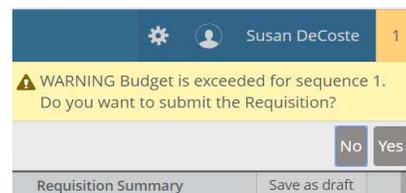
### When to use Direct Pay Check Request (DP) rather than Purchase Order?

- Professional organizations and membership fees
- Emergencies
- Travel: hotel, conference registration, transportation
- Office periodical subscriptions (not library)
- Licenses and permits
- Vendor will not accept a Purchase Order or purchase requires prepayment

### **Before creating an online requisition:**

- Check your budget to ensure there are funds available. **FGIBDST**
- Review the Purchasing Guidelines for Goods and Services (attached)
- Verify that your Vendor is active in Banner. **FTIIDEN**
- New Vendors require a W-9 form sent to AP for Vendor setup.

**\*If budget is not available, the warning below will appear when you submit a requisition:**  
You may continue but you must prepare a Budget Modification to correct the issue.



# BRISTOL Purchase Requisition Worksheet

COMMUNITY COLLEGE

Requisition Number \_\_\_\_\_

Purchase Order Number \_\_\_\_\_

Purpose: This form may be used to gather information prior to creating a purchase requisition in the Banner system. This form is optional and provided as a resource only. It is NOT a Purchase Order and cannot be provided to a vendor or used in any manner that may be construed to initiate an order or obligate College funds.

## SECTION 1: REQUESTOR INFORMATION

Name \_\_\_\_\_ E-mail \_\_\_\_\_ Phone \_\_\_\_\_

Department \_\_\_\_\_

## SECTION 2: Order Information

Vendor Name \_\_\_\_\_ Banner Vendor ID \_\_\_\_\_

Date Needed By \_\_\_\_\_

Item #	Commodity Code	Description (product number#, description, mfg)	Qty	Unit Price	Ext. Price	Fund	Account Code
1							
2							
3							
4							
5							
6							
7							
8							

Page 1 Total

Page 2 Total

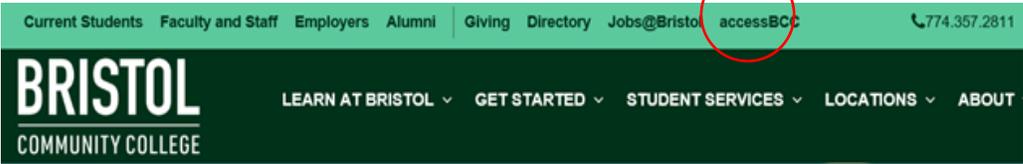
Requisition Total

Print

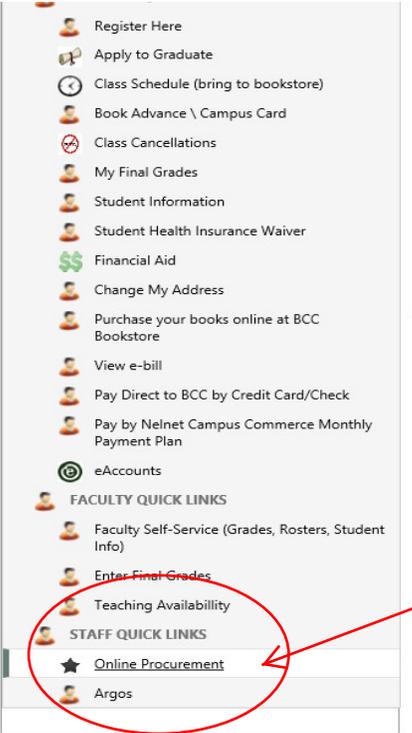
Reset

Begin the Requisition process by **logging into Banner 9 Self Service** through **accessBCC**. Your Username will be the same as your initial Windows login for your Bristol PC. Example: Sdecost11

Step#1

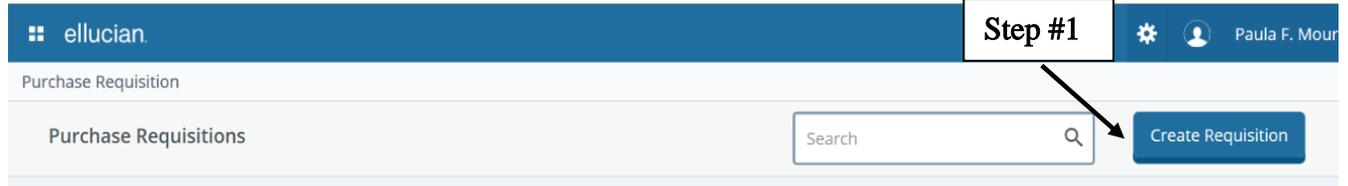


Step #2  
Enter your Username and  
Windows login password



Step #3  
Click here to begin the  
Online Procurement  
(Requisition Process)

## Once Logged in you will start at the Purchase Order Requisition Dashboard Page



### Requestor Information Page – Enter all required fields with an \*

- **Requestor** - Defaults to the user ID – specify who is requesting the purchase order using available fields if you are not the default requester for the account.
- **Transaction Date** – defaults to current day.
- **Delivery Date** – Use today’s current date. Failure to add the delivery date will result in an error.
- **Document Level Accounting** – Accounting can be split between multiple FOAPALs, but only on a percentage or flat dollar amount basis. Each commodity line cannot be charged to a different FOAPAL.
- **Public Comment** – Click on Public Comment to open box. Wording here will print on the Purchase Order. Include MHEC or State contract number, or Bristol Bid Number.
- **Private Comment** – Click on Private Comment to open box. This field is used for messages to the Bristol Purchasing department. Include here the delivery method of Purchase Order to Vendor: **FAX, Email or regular mail**. This information will not print on Purchase Order.
- **Chart** – this defaults to B.
- **Organization** – Org can be typed in or found in the drop down list.
- **Ship to Location** - **choose** your ship to location from list. BCC1=Elsbree St.
- **Attention to** – Clear field and type the name of the individual that the products are to be shipped to.
- Click **Next** to proceed to the next page. See print screen example.

## Completed Requestor Information Page

\*\*Use the **Tab Key** to navigate to each block. Pressing the **Enter Key** will cause you to leave the page and you will be returned to the Dashboard.

ellucian Paula F. Moura

Purchase Requisition • Create Requisition

### Create Requisition

**1 Requestor Information** | 2 Vendor Information | 3 Add Item & Accounting | Requisition Summary | Save as draft

Requestor\*  
Paula Mourato

Transaction Date\* 04/05/2017 | Delivery Date\* 04/05/2017

Accounting Type : Document level

Requisition Comments

**1 Public Comment**  
Contract number

2 Private Comment

Chart\*  
B Bristol Community College

Organization\*  
009 Resource Development

Ship To Location\*  
BCC1 SEE REQUESTOR

Attention To\* Paula Mourato | Tax Group Choose Tax Group

Ship To Location  
Attention: Paula Mourato  
Bristol Community College  
777 Elsbree Street  
Fall River MA 02720-7395

11 FIEL ATTLEBORO  
2GALLE TAUNTON  
800PUR NEW BEDFORD  
BCC1 FALL RIVER  
BCC1 FALL RIVER Add details and click Next to build this summary view.

Back Next

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## Vendor Information Page

On the **Vendor Information page**, select the vendor for the requisition. By default, the **Choose a Vendor for Me** box is checked. **Uncheck** the box to select the vendor from the pull down menu. You may also begin typing a vendor name or tax ID number using autofill.

- Vendor – key in existing Vendor name or tax ID#. Verify the correct Vendor address if more than one option is available.
- Discount – leave as is. This field is for Bristol Purchasing Dept. use only.
- Currency – leave as US dollars
- Make note of Requisition number on the right.
- Click on Next.
- Please acquire a W-9 form for new vendors that need to be set up by AP.

The screenshot shows the 'Edit Requisition' page in the ellucian system. The page is divided into three main sections: 'Requester Information', 'Vendor Information', and 'Add Item & Accounting'. The 'Vendor Information' section is active and contains the following fields:

- Choose vendor for me:** A checkbox that is currently checked. An arrow points to it with a box labeled 'Uncheck Box'.
- Vendor:** A dropdown menu with 'Choose Vendor' selected. An arrow points to it with a box containing the text: 'Choose Existing Vendor or Tax ID #. If vendor you wish to purchase from is not in drop down list, please stop and obtain a W-9 from vendor.'
- Discount:** A dropdown menu with 'Choose Discount' selected.
- Currency:** A dropdown menu with 'USD United States Dollars' selected. An arrow points to it with a box labeled 'Do not enter anything here.'

On the right side of the page, there is a 'Requisition Summary' section with a 'Save as draft' button. The 'Requisition Number' field is circled in red, and the value 'R0000048' is also circled in red.

At the bottom of the page, there are buttons for 'Back', 'Next', 'View as PDF', and 'Submit Requisition'. An arrow points to the 'Next' button.

## Edit Requisition – Add Items

- Type item # and description in **Add Item(s)** field or use drop down menu. 50 maximum characters are allowed.
- Choose **Units of Measure** (such as Each or Package) from drop down list
- Enter **Quantity** (# of units) and **Unit Price** (cost for one unit)
- Enter **Additional Amount** for shipping costs etc.

Enter a **Public Comment** for the item if necessary – ex: MHEC or State contract number for a specific item. This will print on the purchase order below the item.

Click on **Save** and repeat steps above for additional products.

*\*\*If you have 4 or more items to enter you may type in See Attached List in the Item Code section. Use 1 as the unit of measure and enter the total amount of order for unit price.\*\* Attach the quote or shopping cart page from vendor at anytime during the Edit Requisition process. See page 10 for Add Attachment Instructions.*

The screenshot displays the 'ellucian' 'Edit Requisition' interface. The 'Item Code (#)' field is circled in red and contains '#SAD15 DUCT TAPE'. Below it, the 'Unit Of Measure\*' is set to 'Each (EA)', 'Quantity\*' is '25.00', and 'Unit Price\*' is '2.9900'. The total '(Quantity) X (Unit Price)' is 'USD 74.75'. The 'Discount Amount' is '10.00' and the 'Additional Amount' is '4.99'. The 'Tax Amount' is '0.00'. The 'Commodity Item Total' is 'USD 69.74'. Annotations include: 'Not needed at this time.' pointing to the 'Public Comment' field; 'Enter any additional amounts such as shipping costs.' pointing to the 'Additional Amount' field; and 'Enter any applicable discount you are given on the product.' pointing to the 'Discount Amount' field. A sidebar on the right shows 'Requisition Number R0000073' and vendor information for '3M - Health Information System (410417775)'. The bottom of the interface shows a 'Save' button circled in red.

SAVE each commodity you add.

## Edit Requisition – Add Additional Items

Once you have finished adding items and you have saved a final time, click on **Add Accounting**.

**ellucian** Paula F. Mourato

Purchase Requisition • Edit Requisition

**Edit Requisition** Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

Paper	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Requestion Summary Save as draft

Requestion Number R0000048

W B Mason Inc. (042455641)  
59 Centre St  
Brockton MA 02403

Commodities (1)

Paper	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

The page refreshes with the item you just added. A list of items ordered will appear in the Commodities list. You can click any item in the list to view its detail.

Back Add Accounting View as PDF Submit Requisition

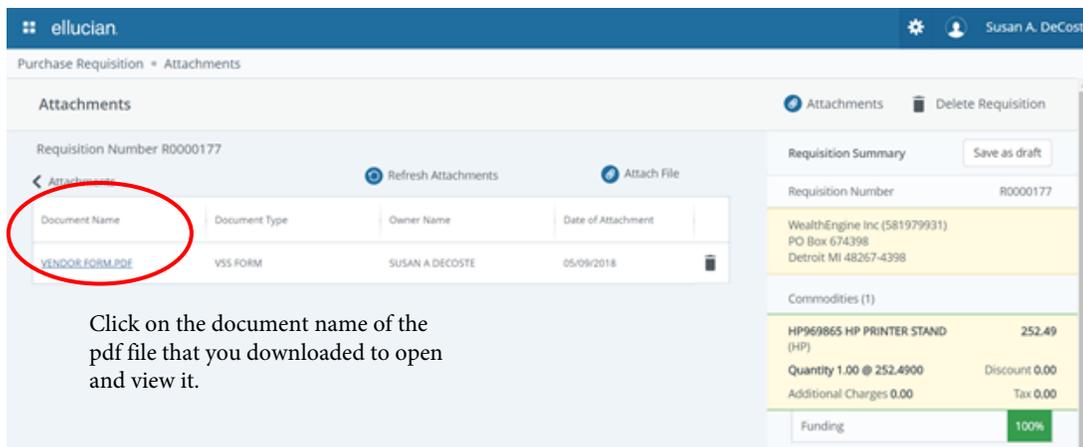
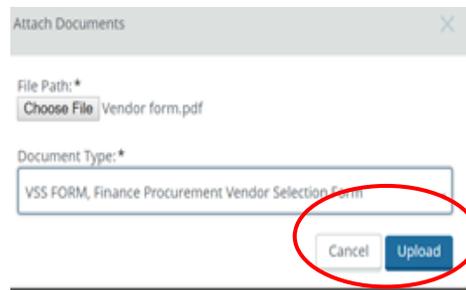
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## Attach Requisition Backup (Lists, Quotes, Receipts, Vendor Selection Form)

- Click on Attachments.
- Click on Attach File. The file must be in a PDF format.
- Browse to find documents to attach from hard drive such as quotes and contracts.
- Document Type: Click on drop down and select type. Click on **Upload**.
- View document by clicking on the name of file.



### Example of Adding an Attachment



## Edit Requisition - Add Accounting

- **Chart** defaults to B. **Index** is not needed at this time.
- Enter or choose the **Fund, Organization, Account, Program and Activity** from the drop down list.
- **Location** and **Project** do not need to be completed.
- **Distribution Amount** will be the total amount of items purchased and **Distribution Percent** will be 100%. (If **split funding** is needed for payment, see next page before you save.)
- **Save**
- View the document as a **PDF (optional)**

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At anytime, you can save your purchase requisition as a draft and return to it at a later time.



Purchase Requisition ▸ Edit Requisition

1 Requestor Information
2 Vendor Information
3 Add Item & Accounting

Requisition Number (R0000048)      Currency USD

Chart\* B Bristol Commun... x      Index Choose Index x

Fund\* T17 General Operations x

Organization\* 009 Resource Development x

Account\* E01 Office and Administrative Supplies x

Program\* 60 Institutional Su... x      Activity Choose Activity x

Location Choose Location x      Project Choose Project x

Distribution Amount\* 20.00      Distribution Percent\* 100.0000

Discount Amount 0.00      Additional Amount 0.00

Tax Amount 0.00

Distribution Total 20.00

Remaining 0.00

Requisition Summary

Requisition Number R0000048

W B Mason Inc. (042455641)  
59 Centre St  
Brockton MA 02403

Commodities (1)

Paper	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

**Program Codes:**

- 10 Instruction
- 20 Research
- 30 Public Service
- 40 Academic Support
- 50 Student Service
- 60 Institutional Support
- 80 Operation & Maintenance of Plant

Back
Save
View as PDF
Submit Requisition

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## Split Accounting

Split accounting occurs when a requisition requires payment from the budget of more than one **Fund** or **ORG**. Usually when you split costs between budgets, an exact amount will be charged to each budget. In the example below, the funding is split between T17 006 E01 and P1050 009 E01STR. If you enter an amount less than the total in the Distribution Amount, the screen will prompt you to **Split the Accounting**. Click on Split Accounting. A new page will open to add the other funds/account information. **Save**

**ellucian** Susan A. DeCoste

Purchase Requisition • Edit Requisition

**Edit Requisition** Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number (R0000076) Currency USD

Chart\* Index  
B Bristol C... Choose In...

Fund\*  
Choose Fund

Organization\*  
006

Account\*  
Choose Account

Program\* Activity  
Choose Pr... Choose Ac...

Distribution Amount\* 20.00 Distribution Percent 24.7183

Discount Amount 0.00 Additional Amount 0.00

Tax Amount 0.00

Distribution Total 20.00

Remaining 12.75

Split Accounting →

If you enter an amount less than the total in the Distribution box, the screen will prompt you to Split the Accounting. You can also enter a percentage and the split amounts will be calculated for you.

Commodities (2)

HP969865 HP PRINTER STAND (HP)	74.85
Quantity 15.00 @ 4.9900	Discount 0.00
Additional Charges 0.00	Tax 0.00
#5AD15 DUCT TAPE (#)	11.25

Funding 59.5238%

Additional funding is needed to reach 100%.

**ellucian** Susan A. DeCoste

Purchase Requisition • Edit Requisition

Add Item(s)  
Choose Item

Commodities (2)

HP969865 HP PRINTER STAND (HP)	74.85
Quantity 15.00 @ 4.9900	Discount 0.00
Additional Charges 0.00	Tax 0.00
#5AD15 DUCT TAPE (#)	11.25

Funding

Funding	Amount
B-T17-006-E01-60	51.25
B-P1050-009-E01STR-60	34.85
Accounting Total	86.10
Commodity Total	86.10
Balanced	100%

If you need to change the funding split, double click on the funding line and you will be brought back to the Distribution screen above to make changes.

Click on the green percentage box to view the funding lines.

Back View as PDF Submit Requisition

## Purchase Requisition with Split Funding – Viewed as PDF

- Close tab when you have finished viewing the PDF.

**PURCHASE REQUISITION**  
(Non-negotiable; not a valid Purchase Order)

<b>Requestor</b>	Sue Decoste	<b>Requisition #</b>	R0000120
<b>Phone</b>	- Ext 3337	<b>Transaction Date</b>	03/21/2018
<b>Email</b>	sue.decoste@bristolcc.edu	<b>Delivery Date</b>	
<b>Organization</b>	Human Resources/Affirmative Action (006)	<b>Status</b>	Draft
<b>Accounting Type</b>	Document Level	<b>Currency</b>	USD

<b>Ship To</b>	BCC1	<b>Vendor</b>	W B Mason Inc.
<b>Address</b>	Bristol Community College 777 Elsbree Street Fall River MA 02720-7395	<b>Address</b>	59 Centre St PO Box 111 Brockton MA 02403
<b>Attention To</b>	Susan DeCoste - Ext	<b>Phone</b>	- Fax - 7734488

**Requisition Comments**      New Encumbrance Test

**Commodities**

Item	Description	U/M	Quantity	Unit Price	Other	Total
1	Encumbrance	ENC	1.00	5,000.0000	0.00	5,000.00

**Grand Total - All Commodities**      5,000.00

**Accounting Distributions**

Sequence #	Chart-Index-Fund-Orgn-Acct-Program	Distribution Percent	Distribution Total
1	B - T17-006-E01-60	100.0000	5,000.00

**Grand Total - All Accounting**      5,000.00

**DISCLAIMER - A Purchase Requisition does not represent a valid Purchase Order to provide to a vendor or supplier. As such,**

## Edit Requisition – Submit

Once the Requisition is **Saved**, the following screen will appear.

- Review all **Commodities/Items**
- Review **Funding**
- If you need to make a change use the **Back** button
- Before you submit the requisition, you can add **attachments** if needed. See next page for instructions.
- **If you do not have an attachment, you can now Submit Requisition for Approval**

The screenshot shows the 'Edit Requisition' page in the ellucian system. The interface includes a top navigation bar with the ellucian logo and user information (Paula F. Mourato). The main content area is divided into sections for 'Requestor Information', 'Vendor Information', and 'Add Item & Accounting'. A 'Commodities (1)' table lists 'Paper' with a quantity of 1.00 and a total amount of 20.00. A 'Funding' table shows 'B-T17-009-E01-60' with an amount of 20.00. A 'Balanced' indicator shows 100%. On the right, a 'Requisition Summary' section displays the requisition number (R0000048) and vendor information (W B Mason Inc.). Callout boxes provide instructions: 'Click to add Attachments' points to the 'Attachments' button; 'Review your list of Commodities' points to the commodity table; 'Click on this box to open up the funding and make changes.' points to the funding table; 'Click on funding line to make changes.' points to the 'B-T17-009-E01-60' funding line; and 'Clicking on Back will return you to the Vendor page.' points to the 'Back' button. The 'Submit Requisition' button is circled in red.

If budget is not available for the accounting you chose, the warning below will be given when you click on SUBMIT. Prepare a Budget Modification to correct the issue.

A warning dialog box is displayed, indicating that the budget has been exceeded for sequence 1. The message reads: 'WARNING Budget is exceeded for sequence 1. Do you want to submit the Requisition?'. The dialog box includes 'No' and 'Yes' buttons for user response.

## Purchase Requisitions – Status Page

Status	Description
Draft	Requisition previously saved as a draft and awaiting final submission. You can edit and submit.
Pending	Requisition is pending approval in one of the Banner Finance approval queues.
Disapproved	Requisition submitted but disapproved by a Banner Finance approver. The approver can provide Disapproval Text explaining why the requisition was disapproved. You can edit disapproved requisitions and resubmit them.
Completed	<ul style="list-style-type: none"> <li>Completed = Requisition approved and posted.</li> <li>Converted to PO = Requisition items converted to PO</li> <li>Assigned to Buyer = Requisition given a buyer code</li> </ul>

Draft Requisitions <span style="background-color: #e0ffe0; border-radius: 50%; padding: 2px;">10</span>				
R0000134	03/29/2018	\$6,919.92	Pitney Bowes Inc.	Disapproved
R0000078	02/27/2018	\$18.93	W B Mason Inc.	<div style="border: 1px solid gray; padding: 2px;">           Disapproval Text            This vendor is no longer used.         </div>
<a href="#">View More</a>				

Purchase Requisition				
R0000073	02/22/2018	\$0.00		Draft
<a href="#">View More</a>				
Pending Requisitions <span style="background-color: #e0ffe0; border-radius: 50%; padding: 2px;">5</span>				
R0000092	03/07/2018	\$287.64	1st IN Coffee	Pending
R0000078	02/27/2018	\$18.93	W B Mason Inc.	Pending
<a href="#">View More</a>				
Completed Requisitions <span style="background-color: #e0ffe0; border-radius: 50%; padding: 2px;">4</span>				
R0000076	02/22/2018	\$86.10	Techrepublic	Converted to PO
R0000054	01/31/2018	\$469.80	100 Steps to Wealth	Converted to PO

## Purchase Requisitions – Status Page Continued

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Purchase Requisition

Purchase Requisitions  [Create Requisition](#)

Requisition	Date	Amount	Vendor	Status
Draft Requisitions <span style="color: green;">0</span>				
Pending Requisitions <span style="color: green;">4</span>				
R0000048	04/05/2017	\$20.00	W B Mason Inc.	<span style="color: purple;">Pending</span>
R0000045	04/01/2017	\$3,000.00	W B Mason Inc.	<span style="color: purple;">Pending</span>
				<a href="#">View More</a>
Completed Requisitions <span style="color: green;">9</span>				
R0000041	03/28/2017	\$500.00	W B Mason Inc.	<span style="color: green;">Completed</span>
R0000039	04/03/2017	\$1,488.49	W B Mason Inc.	<span style="color: green;">Converted to PO</span>
				<a href="#">View More</a>

**This number indicates the number of Completed Requisitions**

**There are 9 Completed Requisitions. Click on view more to see the additional 7**

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## Purchase Requisitions – Status Page Continued

Click on the icon next to **Pending** to scroll through the of the Approval Queue sequence. Click on the icon next to the **Converted to PO** to view the Purchase Order Number assigned.

The screenshot shows the 'Purchase Requisitions' page in the ellucian system. The table lists requisitions with columns for Requisition, Date, Amount, Vendor, and Status. A callout box points to the 'Pending' status of requisition R0000069, stating 'Displays the next Approver and the back up Approver'. A dropdown menu is open for this requisition, showing the 'Approver & Queue Info' with the following details:

- Approver: Carolyn Ross
- Queue: Requisition - Org 006 (Y025)
- Approver: Filomena Ponte

The screenshot shows the 'Purchase Requisitions' page in the ellucian system. The table lists requisitions with columns for Requisition, Date, Amount, Vendor, and Status. A callout box points to the 'Converted to PO' status of requisition R0000054, stating 'Click here to view the Purchase Order number that was assigned to the approved Requisition.' A dropdown menu is open for this requisition, showing the 'Purchase Order Info' with the following details:

- Purchase Order: TS000054

## Purchase Requisitions – Copy a Requisition

From the Status page you have the ability to **Copy a Requisition**. Click on the **Converted to PO** icon for the requisition you want to copy. The **View Requisition** screen will now appear. Click on **Copy Requisition**.

The screenshot shows the 'View Requisition' interface in the ellucian system. The top navigation bar includes the ellucian logo, a settings gear, a user profile for Susan A. DeCoste, and the text 'Purchase Requisition > View Requisition'. Below the navigation bar, the 'View Requisition' button is highlighted with a red circle. To its right are buttons for 'View Attachments' and 'Copy Requisition', with an arrow pointing to the latter. The main content area is divided into three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Requestor Information' tab is active, showing details for Sue Decoste, including transaction date (01/31/2018) and delivery date (12/17/2018). The 'Vendor Information' tab shows details for B Bristol Community College, including chart (006 Human Resources/Affirmative Action) and ship-to location (777 Elsbree Street, Fall River MA 02720-7395). The 'Add Item & Accounting' tab shows a list of commodities with their respective quantities and prices. The 'Requestion Summary' section on the right provides an overview of the requisition, including the requisition number (R0000054) and a list of items.

Requestion Summary	
Requisition Number	R0000054
100 Steps to Wealth (363839203) P O Box 11472 Des Moines IA 59336-1472	
Commodities (3)	
HP969865 HP PRINTER STAND (HP)	359.85
Quantity 15.00 @ 23.9900	Discount 0.00
Additional Charges 0.00	Tax 0.00
#KFGT160 5 FT METAL TIP ROLLER EXTENSION HANDLE (Q)	84.95
ADVANTAGE 1200 INK-JET CARTRIDGE RFD (INKJET CRT)	25.00

## Purchase Requisitions – Copy a Requisition Continued

Click on Yes to copy to create a copy of the existing requisition.

The screenshot displays the ellucian Purchase Requisition system interface. At the top, the user is identified as Susan A. Decoste. The main page is titled 'View Requisition' and is divided into three sections: 1. Requestor Information, 2. Vendor Information, and 3. Add Item & Accounting. The Requestor Information section shows the name Sue Decoste, Transaction Date 01/31/2018, and Delivery Date 12/17/2018. The Vendor Information section shows Chart B Bristol Community College and Organization 006 Human Resources/Affirmative Action. The Add Item & Accounting section shows Ship To Location BCC1 Bristol Community College, 777 Elsbree Street, Fall River MA 02720-7395. A right-hand sidebar contains a 'Requisition Summary' with details such as Requisition Number R0000054, address 100 Steps to Wealth (363839203) P O Box 11472, Des Moines IA 59336-1472, and a list of commodities including HP969865 HP PRINTER STAND (HP) for 359.85 and ADVANTAGE 1200 INK-JET CARTRIDGE (RFD) (INKJET CRT) for 25.00. A yellow confirmation dialog box is overlaid on the top right, asking 'Do you want to copy this requisition?' with 'No' and 'Yes' buttons. An arrow points to the 'Yes' button.

## Purchase Requisitions – Copy a Requisition Continued

The requestor, vendor, commodity, and accounting information are carried forward to the new document. Navigate through the new requisition making necessary changes such as date and delivery date. Once all changes are completed, click on **Next**.

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Purchase Requisition • Edit Requisition

R0000072

Requestor\* Sue Decoste

Transaction Date\* 02/22/2018 Delivery Date\* MM/DD/YYYY

Accounting Type: Document level

Requisition Comments

1 Public Comment

Contract #789

2 Private Comment

Bristol Community College

Organization\* 006 Human Resources/Affirmativ...

Ship To Location\* BCC1 SEE REQUESTOR

Attention To\* SEE REQUESTOR Tax Group Choose Tax ...

Ship To Location

Attention: SEE REQUESTOR  
Bristol Community College  
777 Elsbree Street  
Fall River MA 02720-7395

100 Steps to Wealth (363839203)  
P O Box 11472  
Des Moines IA 59336-1472

Commodities (3)

HP969865 HP PRINTER STAND (HP)	359.85
Quantity 15.00 @ 23.9900	Discount 0.00
Additional Charges 0.00	Tax 0.00
#KFGT160 5 FT METAL TIP ROLLER EXTENSION HANDLE (Q)	84.95
ADVANTAGE 1200 INK-JET CARTRIDGE, RED (INKJET CRT)	25.00

Funding 100%

Back Next View as PDF Submit Requisition

ellucian

## Purchase Requisitions – Copy a Requisition Continued

Once you click on Next, a message will appear that your Requisition has been copied successfully and a new Requisition number will be created.

The screenshot displays the ellucian Purchase Requisition system interface. At the top, a green notification bar states "Requisition R0000054 copied successfully". The main form area is divided into several sections: "Requestor Information" (Requisition Number: R0000071, Requestor: Sue Decoste), "Vendor Information" (Chart: B Bristol Community College, Organization: 006 Human Resources/Affirmativ...), and "Add Item & Accounting" (Transaction Date: 02/22/2018, Delivery Date: MM/DD/YYYY, Ship To Location: BCC1 SEE REQUESTOR, Attention To: SEE REQUESTOR, Tax Group: Choose Tax...). A "Requisition Comments" section shows a public comment: "Contract #789". On the right side, a summary table lists the requisition details:

Requisition Number	R0000071
100 Steps to Wealth (363839203)	
P O Box 11472	
Des Moines IA 59336-1472	
Commodities (3)	
HP969865 HP PRINTER STAND (HP)	359.85
Quantity 15.00 @ 23.9900	Discount 0.00
Additional Charges 0.00	Tax 0.00
#KFGT160 5 FT METAL TIP ROLLER EXTENSION HANDLE (Q)	84.95
ADVANTAGE 1200 INK-JET CARTRIDGE, RED (INKJET CRT)	25.00
Funding	100%

## Recall a Requisition

You can recall requisitions that are in Pending status. On the Purchase Requisition dashboard page, open the pending requisition that you want to recall. Click on **Recall My Requisition**. On the recall prompt, choose the appropriate option (yes or no). This will put the requisition back on your dashboard as a draft. Once your document is back as a draft, you are then able to edit or delete as needed.

The screenshot shows the 'View Requisition' page in the ellucian system. The top navigation bar includes the ellucian logo, a settings gear, a user profile for Susan A. DeCoste, and a notification count of 1. The page title is 'Purchase Requisition - View Requisition'. The main content area is divided into three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Requestor Information' tab is active, showing details for Sue Decoste, including transaction date (02/22/2018) and delivery date (02/28/2018). The 'Vendor Information' tab shows details for B Bristol Community College. The 'Add Item & Accounting' tab shows shipping location and attention to 'SEE REQUESTOR'. On the right side, there is a 'Requisition Summary' section with a 'Recall My Requisition' button circled in red. Below the summary, there is a table of commodities with details like 'ADVANTAGE 1200 INK-JET CARTRIDGE, RED (INKJET CRT)' and '#KFGT160 5 FT METAL TIP ROLLER EXTENSION HANDLE (Q)'. A funding status of 100% is also visible.

This screenshot shows the same 'View Requisition' page as above, but with a recall prompt overlay. The prompt is a yellow box with a warning icon and the text 'Do you want to recall this Requisition?'. Below the text are two buttons: 'No' and 'Yes', both of which are circled in red. The background content of the requisition page is dimmed.

## Submit the Requisition

Once you have finished creating the requisition and click **submit**, the requisition is forwarded through the electronic approval queue process. The final approval of the requisition is completed by the Purchasing department where it is reviewed for accuracy and then turned into a Purchase Order (PO). Once a Purchase Order# has been assigned, the order will be placed with the vendor.



<b>PURCHASE ORDER</b>		<b>BRISTOL COMMUNITY COLLEGE</b>		Page 1	
		777 ELSBREE STREET FALL RIVER MA 02720-7395 (508) 678-2811 <a href="http://www.bristol.mass.edu">www.bristol.mass.edu</a>		PO Number: <b>TS000065</b> Date of PO: <b>02/27/18</b>	
TO: <b>621756068</b> <small>VENDOR CODE</small>				SHIP TO: Sue DeCoste Bristol Community College 777 Elsbree Street Fall River MA 02720-7395	
Techrepublic Windows NT Admin. Rpt. P O Box 389 Newburgh NY 12551-0389		DATE ENTERED 02/28/18		PURCHASE ORDER NO. AND FEI/FIN NUMBER MUST APPEAR ON ALL INVOICES, CLAIMS, SHIPPING PAPERS, PACKAGES AND CORRESPONDENCE.  MAIL INVOICES IN DUPLICATE TO: ATTN: ACCOUNTS PAYABLE DEPT. BRISTOL COMMUNITY COLLEGE 777 ELSBREE STREET FALL RIVER, MA 02720-7395	
<small>PAYMENT TERMS: See text below for specific terms</small>		<b>Bristol Community College</b> <small>REQUESTOR'S NAME</small>			
ITEM	DESCRIPTION	QUANTITY	UNIT PRICE	EXTENDED PRICE	
1	HP HP969865 HP PRINTER STAND	15.00 EA	4.9900	74.85	
2	# #5AD15 DUCT TAPE	9.00 EA	1.2500	11.25	
				DISCOUNT:	.00
				ADDL CHARGES:	.00
				TOTAL TAXES:	.00
				<b>TOTAL:</b>	<b>86.10</b>
<b>IMPORTANT INSTRUCTIONS</b> CONTACT THE BUYER LISTED ABOVE IN WRITING OR AT (508) 678-2811 IF THERE ARE ANY QUESTIONS REGARDING THIS ORDER OR IF THERE WILL BE MORE THAN A TWO WEEK DELAY IN SHIPPING. DO NOT ENCLOSE INVOICE WITH SHIPMENT		<b>CONDITIONS LISTED GOVERN THE ACCEPTANCE OF THIS CONTRACT</b> DATE FAXED: _____ DATE MAILED: _____		AUTHORIZED COLLEGE SIGNATURE 	
		ACCOUNTS PAYABLE COPY			

## Increase/Decrease an Existing Purchase Order Encumbrance (Below is an example for W B Mason)

A department may request an increase or decrease to an existing approved purchase order using the same procedures to **create a new requisition**. Fill in all required information on the **Requestor Information** page. The **Public Comment** section would include the following example for an increase to a W B Mason purchase order:

**Please increase previous Purchase Order#TS000321 for online ordering by \$250.00**

Continue to the Vendor Information page and complete all required fields. The Item Code should read Increase/Decrease Purchase Order#\_\_\_\_\_. The item **Unit of Measure** will be **ENC (encumbrance)** and the **Quantity** will be **1**. The **Unit Price** will be the amount of your increase or decrease.

**Add Accounting** to include the same information as your original Purchase Order. A new requisition number will be generated. Please make note of the number. **Save** your information and view the new requisition as a pdf before you **Submit** it. Below is a sample of a requisition created to increase an existing Purchase Order with W B Mason:

PURCHASE REQUISITION (Non-negotiable; not a valid Purchase Order)						
Requestor	Sue Decoste	Requisition #	R0000133			
Phone	- Ext	Transaction Date	03/27/2018			
Email		Delivery Date	03/27/2018			
Organization	Human Resources/Affirmative Action (006)	Status	Draft			
Accounting Type	Document Level	Currency	USD			
Ship To	BCC1	Vendor	W B Mason Inc.			
Address	Bristol Community College 777 Elsbree Street Fall River MA 02720-7395	Address	59 Centre St PO Box 111 Brockton MA 02403			
Attention To	Susan DeCoste - Ext	Phone	- Fax - 7734488			
Requisition Comments	Increase PO #TS000321					
<b>Commodities</b>						
Item	Description	U/M	Quantity	Unit Price	Other	Total
1	Increase PO# TS000321 ) Item Text: Please increase previous PO#TS000321 for online ordering by \$250.00	ENC	1.00	250.0000	0.00	250.00
<b>Grand Total - All Commodities</b>						250.00
<b>Accounting Distributions</b>						
Sequence #	Chart-Index-Fund-Orgn-Acct-Program	Distribution Percent	Distribution Total			
1	B - T17- 006- E01- 60	100.0000	250.00			
<b>Grand Total - All Accounting</b>						250.00

An email should be sent to Purchasing at [BusinessServices@bristolcc.edu](mailto:BusinessServices@bristolcc.edu) to cancel a purchase order. Include in the body of the email:

- 1. Contact information/requestor**
- 2. Purchase Order #**
- 3. Vendor Name**

## Log Out When Finished

When you have completed and submitted all of your requisitions, you may log out. Click on the picture of the user and click on sign out.



## Purchasing Guidelines for Goods and Services

### A. Complete the Request for Expenditure (RFE) or Online Requisition

1. Fill in the account code and vendor information.
2. If the total cost of the purchase, including shipping, is less than \$10,000, use sound business practices. Sound business practices are defined as "ensuring the receipt of a favorable price by periodically soliciting price lists or quotes" and requires you to ensure that the College receives the needed quality of supplies and or service at a reasonable price. Submit a completed Request for Expenditure (RFE) or online requisition to your Org. manager or supervisor for approval before forwarding to Fiscal Services for processing.
3. If the total cost of the RFE or online requisition, including shipping, is \$10,000 or more, State purchasing laws must be followed. See "B" below for details.

### B. Follow College and State Purchasing Requirements

1. There are Massachusetts Higher Education Consortium (MHEC) and State contracts that cover many good and or services needed for higher education. These contracts result from public bids awarded by MHEC or the State and make it possible to save both time and money. Check with Business Services at [BusinessServices@bristolcc.edu](mailto:BusinessServices@bristolcc.edu) or at extension 2216 for detailed information. If your purchase falls under a MHEC or State contract, complete the RFE or online requisition as described above and include the MHEC or State contract number on the RFE form or online requisition. Then submit the RFE or online requisition to your Org. manager or supervisor for approval and forward to Fiscal Services for processing.
2. If a MHEC or State contract is not used, College and State purchasing regulations can be satisfied as follows:
  - Obtain (3) written price quotes for purchases greater than \$10,000 to \$24,999. Complete the Vendor Selection Form. Attach the completed Vendor Selection Form and (3) formal price quotes to the RFE or Online Requisition. This form must be approved by the Director of Purchasing and Business Services prior to submitting it to the Fiscal Services or submitting an online requisition.
  - For purchases of \$25,000 or more and not under MHEC or State contract, state law requires, a formal bid process must occur. Please contact Business Services at [business.services@bristolcc.edu](mailto:business.services@bristolcc.edu) or at extension 2216 to initiate the formal bidding process and receive further instructions. You will be asked to provide detailed specifications about the item(s) you wish to purchase and contact information for three or more vendors. It takes approximately two weeks to complete the bidding process and select a vendor.

### C. Additional approval is required for some items

- Furniture/fixtures or related Facilities equipment Contact: Purchasing at ext. 2216

#### Computer-related purchases

- Contact: Administrative Computing at ext. 2135

#### Library materials and audiovisual equipment

- Contact: LRC Staff at ext. 2106

**Vendor Selection Form**

This form documents the purchase of goods and/or services costing \$10,000 to \$24,999. Submit this form, along with (3) written quotes, with the Purchase Order to Business Services, unless the items are procured from the MHEC or State contract or meet the requirements of a sole source vendor.

Competitive Quote Information		
Vendor Name	Quote #	Comments

Purchasing laws permit the selection of a vendor based on "best value" to the college. Lowest price is not always the most important determining factor. If the vendor you selected did not offer the lowest price, please explain why you believe the vendor to be the best value (attach an additional page), if necessary.

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**Reason for Selection (add explanation below)**

- |   |  |
|---|--|
| <input type="checkbox"/> Supplier provided the best overall offer                                 | <input type="checkbox"/> Emergency/Urgency           |
| <input type="checkbox"/> Compatibility with existing equipment                                    | <input type="checkbox"/> College sponsored consortia |
| <input type="checkbox"/> Contract with vendor for goods or services                               | <input type="checkbox"/> Other (explain below)       |
| <input type="checkbox"/> Supplier is sole manufacturer/provider (attach documentation)            |  |
| <input type="checkbox"/> Supplier is sole acceptable manufacturer/provider (attach documentation) |  |

**Explanation**

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**Certification**

I certify that the information on this form is accurate and that the best interests of the college have been served by selecting this vendor.

Signature: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_

Date: \_\_\_\_\_

Approved By: \_\_\_\_\_  
Director of Purchasing and Business Services

Date: \_\_\_\_\_