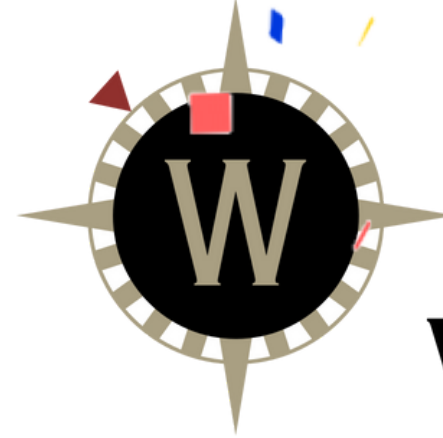


WUCL Student Organization Orientation



WILLAMETTE
THE FIRST UNIVERSITY IN THE WEST

I'VE BEEN ELECTED TO THE EXECUTIVE BOARD!

now what?



YOUR WILLAMETTE RESOURCES

Office of Student Affairs (OSA), 2nd Floor



Contact Maegan Dunlap for commencement/graduation information, ADA Exam accommodations and registration related questions.

mdunlap2@willamette.edu



Contact Andrea Saele for attendance and scheduling classrooms in law building

asaele@willamette.edu



Contact Enam Al Bustami for budget access, reimbursement requests, spring banquet contract coordination, and travel coordination

ealbustami@willamette.edu

Note: OSA window closes at 5:00 pm

Additional Resources

OCPD, 2nd floor

**Contact OCPD to minimize event conflicts
email: law-career@willamette.edu**

Please remember*

**Wednesday lunch
hours are reserved for
the OCPD events**

Fundraising/Alumni Engagement

**Contact Tiffany Newton - Director
of Alumni and Parent Engagement
for help with outreach to alumni
for donations, publicity, and
speaker requests.**

Email: trnewton@willamette.edu

Additional Resources

Willamette integrated technology services (WITS)

Contact WITS for tech help

- WITS help desk: 503-370-6767
- Email: wits-info@willamette.edu
- Preferably submit a service request
 - <https://willamette.edu/offices/wits/sr/index.html>
 - AV/sound services
 - computer and equipment checkout
 - recording

Organization Accounting

- Established groups have a budget and general ledger number (GL#). Budget information is accessible from Student Self Service
- You will use the GL# for:
 - expense reimbursements
 - check requests
 - making purchases on campus (Bon Appetit, Print Design, etc.)
- An example of a GL#: Fund Unit Object
 21- 9WXXX - 2213
- Organizations should email Enam Al Bustami with the names of the President and Treasurer and she will request budget access from Accounting.

Organization Accounting

- To access GL reports:
 - log into Student Portal
 - Click on Sage

Welcome to the Student Portal

We appreciate your [feedback and suggestions](#) about our portal.

[WISE](#)[SAGE](#)[WORKDAY](#)[WEBADVISOR](#)[EVENT SCHEDULING REQUESTS](#)[FORMS](#)[HANDSHAKE](#)[JASON](#)[LINKEDIN LEARNING](#)[STUDENT SELF-SERVICE](#)[BEARCAT BNB](#)


MY ALERTS

 Could not retrieve alerts from Colleague.

Organization Accounting


- Click on Financial Management


Hello, Welcome to Self-Service!
Choose a category to get started.


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

- In Financial Management Overview choose Finance Query

Financial Management Overview

 **Budget to Actuals**
Here you can view the financial health of your cost centers.

 **Finance Query**
Here you can query your financial data.

 **Projects Accounting**
Here you can view the financial health of your projects.

Organization Accounting

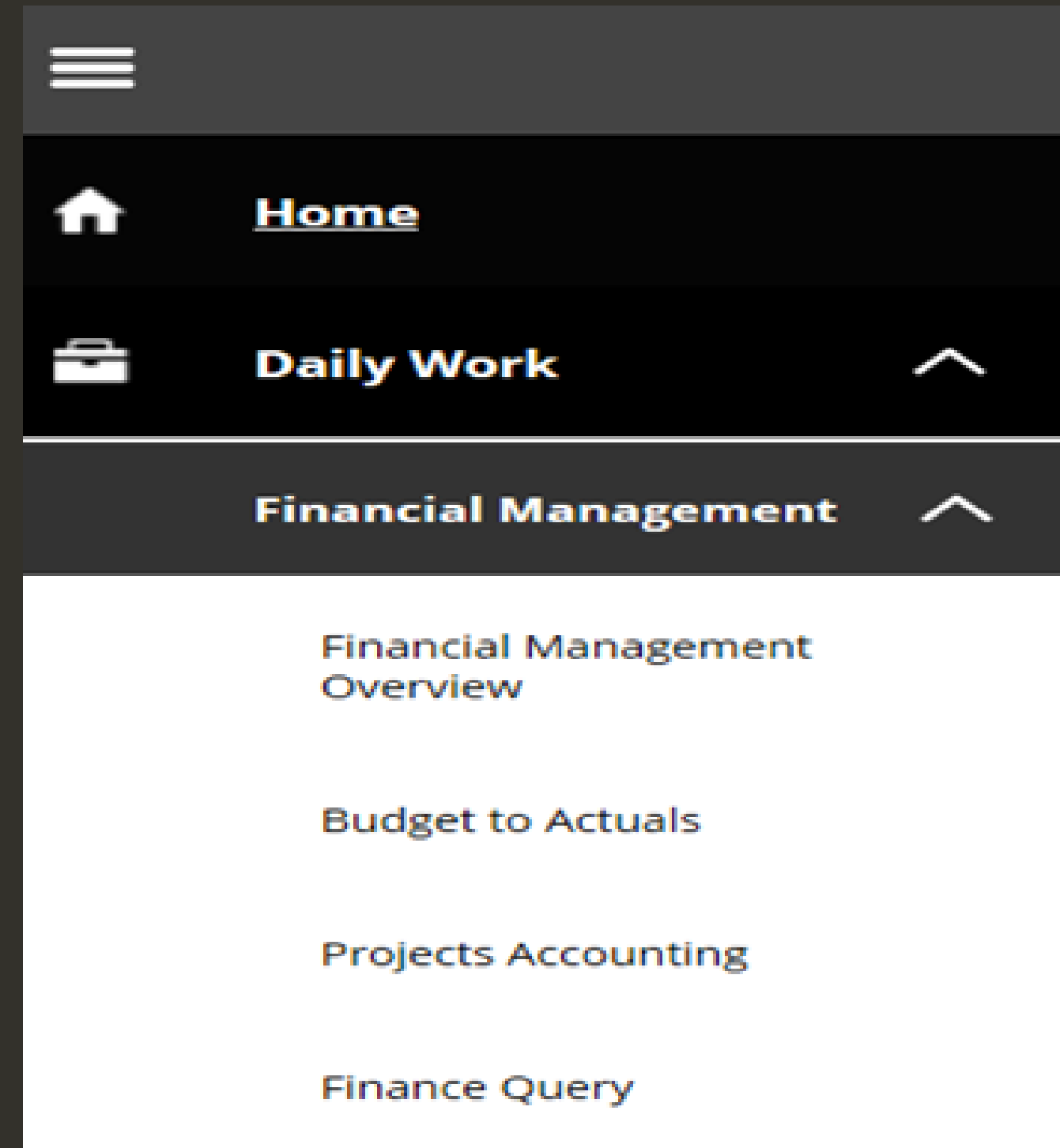
- Click Filter
 - fund - 2 digits
 - 21 - groups who receive SBA funding
 - 10 - groups funded via the University (journals or experiential learning)
 - unit - 5 digits
 - 9Wxxx or 5Wxxx - SBA funded accounts
 - 10xxx or 20xxx - University funded (WUPILP, Law Review)

The screenshot displays the 'Finance Query' interface. At the top, there are navigation links: 'Daily Work', 'Financial Management', and 'Finance Query'. Below this, the title 'Finance Query' is centered. On the right side, there are controls for 'FY2020' (a dropdown menu), 'Actuals Start Date' (6/1/2019 with a calendar icon), 'Actuals End Date' (5/31/2020 with a calendar icon), and an 'Export' button. On the left side, there is a 'Filter' section with a dropdown arrow. Below this, there are three filter criteria: 'Fund' with a value of '21', 'Unit' with a value of '9W000', and 'Object' with a placeholder 'Object value or range'. There are also checkboxes for 'Include Active Accounts with No Activity' and 'Sort Options'. At the bottom of the filter section is an 'Apply Filter' button. A blue banner across the top of the main content area reads 'Apply a filter to see Finance Query results.'

Organization Accounting

No Financial Management Tab?

Try the side bar menu under Daily Work



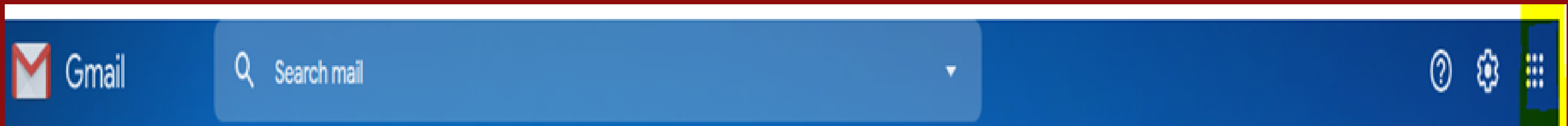
Group Email & LAWSTU Access

- Presidents and Treasurers are granted "Owner" access to their organization listserv
- All Presidents are set up as "Owners" of their groups email and they can add and delete members as needed

Make sure to familiarize yourself with the SBA Constitution and Bylaws regarding listserv use

Group Email & LAWSTU Access

- Listservs are now Google Groups - Access via 9 dot grid
 - click on "**Groups**" icon



- Group Presidents and Treasurers will be "**Owners**" of the organization groups, so they can add/delete members
- Messages subject to approval - please use for student organization and SBA events and school related activities

Group Email & LAWSTU Access

- Law-stu and class group listservs are now:



Willamette College of Law - Class of 2023

law-2023@willamette.edu

All Law students graduating in 2023



Willamette College of Law - Class of 2024

law-2024@willamette.edu

All Law students graduating in 2024



Willamette College of Law - Class of 2025

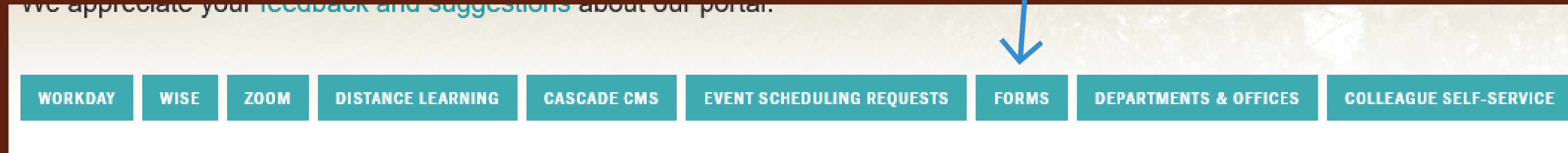
law-2025@willamette.edu

All Law students graduating in 2025

**All law students: law-students@willamette.edu*

Expense Reimbursements

- Find "**Forms**" in Student Portal



- Click on "payment request" PDF

Email Enam Al Bustami copies of receipts, list of attendees, and payment request form.

- Itemized receipts Required!

Expense Reimbursements

Keep all original receipts to submit for reimbursements

Reimbursements

Reimbursements can be forwarded to accounting by Enam Al Bustami at OSA

- Reimbursements given as
 - direct deposit is QUICKER
 - check request
- Expect a 1-2 week turnaround

*No Cash

The screenshot shows the 'Payment Request' form for Willamette University. At the top left is the university logo and name. On the top right are 'SAVE' and 'RESET' buttons. The form includes fields for 'REQUEST DATE' (Jul/26/2022) and 'AMOUNT' (0). A red header section is titled 'VENDOR INFORMATION' and contains a checkbox for 'REIMBURSE MYSELF (Attach Expense Report Addendum for travel, meals and entertainment.)'. Below this are fields for 'PAYEE ID', 'PAYEE', and 'ADDRESS'. Further down are fields for 'INVOICE NUMBER' and 'INVOICE DATE'. A table titled 'ITEMS' has columns for 'ITEM DESCRIPTION*', 'G/L ACCOUNT', 'PROJECT ID', and 'AMOUNT'. Below the table is a 'TOTAL' field with a value of 0. A section for 'PAYMENT PURPOSE' has a text area for a detailed explanation. The bottom part of the form is divided into two main sections: 'REQUIRED FOR ALL PAYMENT REQUESTS' and 'ADDITIONAL APPROVALS AS NEEDED'. The first section includes a 'REQUESTED BY' field with a 'Printed Name' sub-field and a 'BUDGET OFFICER APPROVAL (Total up to \$10,000)' box. The second section includes a 'FISCAL OFFICER APPROVAL (Between \$10,000 And \$50,000)' box and a 'VP/DEAN APPROVAL (\$50,000 and up)' box. A note under the VP/DEAN approval states: '(Note: Payment Request between \$50,000-\$100,000 requires two signatures from Senior VP or VP of appropriate division. Payment Request above \$100,000 must be signed by the President or VP for Finance and Controller.)'. At the very bottom, a yellow banner reads: 'Submit form and supporting documents in DocuSign where all forms are routed for signature and delivered to Accounting.'

Expense Reimbursements

Collecting funds for a fundraiser

The University is CASHLESS.

- **Credit card machines available** - check out for up to a week at a time
 - only wired machines work in Law School
 - wireless options on campus - machines will not work off campus
 - square now available - 2.75 fee charged per swipe
- **Touch Net Marketplace** - WITS can help
- Set up an account - we can get you set up with a square terminal and a square merchant account. The machine costs \$299. Allow a month to get the equipment ordered, account set up, and equipment set up on our network

Event Planning - Scheduling

- One officer per organization will have scheduling access
 - Attempt to log in - no template
 - Contact Andrea Saele for access

- Check EMS for room availability.

*ALL students have viewing ability in

EMS 

Home > Offices > Service Center > Scheduling and Events

Scheduling and Events

As part of the Service Center, we are responsible for overseeing space reservations on campus. On this page you will find helpful tools and resources to use when you plan your next event.

Including:

- [Event Guides](#)
- [University Policies](#)
- [Setup Suggestions and Diagrams](#)
- [Links to Service Providers](#), and much more!

If you have any additional questions, send an email to service-center@willamette.edu, and we'll get back to you as soon as we can.

Helpful Links

- [Bon Appétit](#)
- [Campus Tours and Maps](#)
- [Campus Safety](#)
- [Student Life](#)

Reserving Space (EMS)

The EMS Web Application lists all currently scheduled rooms, with forms for requesting event spaces.

[EMS APPLICATION](#)

Room Configurations

View floor plans and layouts of the available event spaces on Campus (sorted by building).

[VIEW ROOM CONFIGURATIONS](#)

Planning Tool

Here you can find a detailed questionnaire to assist you in planning your event, prior to making a reservation.

[QUESTIONNAIRE](#)

Event Planning - Scheduling

- Request the space for the event at least **10 days** prior to the event and allow at least **72 hours** for your event to be confirmed.
- Include **all** details and requests for your orders at the time of the room request.
- You will not be able to add services after the room has been confirmed!
- Keep in mind - Do not schedule anything back to back with a class or other events/meetings
- Do not schedule large events during other large events. Consider availability for **WITS/Catering/Facilities**

Event Planning

- To publicize your events:
 - visit Law Events Calendar
 - *willamette.edu/offices/webdev/calendar*

WU Events Calendar

Follow these instructions to create new events or modify your previously submitted events for the Willamette calendar. Approved events will appear on the university calendar, the Willamette website, and in Today@Willamette.

Jump to a Topic

Add and Modify Events

- Create a new event
- Modify an existing event
- Event name
- Options tool bar
- Summary
- Full description
- When is the event?
- Repeating/recurring events
- Event URL
- Make event private
- Make event unlisted
- Categories & Keywords
- Locations
- Contact
- Images
- Attachments
- Submit your event
- Save for later
- Event Approval Process

Event Planning

- To create flyers for your event visit: willamette.edu/offices/print-design
- To post slides on the law school TV screen:
 - create a 1 page 3840x2160 landscaped .JPG or .PNG formatted file
 - email this to Enam Al Bustami and CC Jessica Rotter - jrotter@willamette.edu
 - specify the dates the ad should run through
 - submit information 5 business days in advance of the event to get event published in time!
 - The less words the better!
- To publicize your events via Google Calendar: Contact OSA to add events to Law Events Calendar willamette.edu/offices/webdev/calendar

Event Planning

Space Rental Contracts for off Campus Events

- Review and approval by Dean Dobbins – give contract to OSA

Serving food at your event

- **Bon Appétit**
 - catering@willamette.edu

- **Serving alcohol**

- Request form
- Security – contact Campus Safety

The screenshot shows the 'Student Organizations Forms' page of the Student Bar Association. The page includes a navigation menu with links to 'SBA Constitution', 'Student Organization Bylaws', 'Executive Committee', and 'SBA Outline Bank'. A 'Student Organizations Forms' button is highlighted. Below this is contact information for the Student Bar Association at Willamette University College of Law. The main content area is divided into several sections: 'Financial Affairs & Check-Off Lists' (including Accounting Forms, Contract Approval Form, Deposit Slips, Expense Reimbursement, Insurance forms, Petty Cash Disbursement, Request for Payment, SBA Budget Request, and W-9), 'Miscellaneous Forms' (including Bon Appétit, Campus Safety, and College of Law forms), and 'Scheduling, Events, & Conferences' (including Alcohol Request Form and WU Alcohol Policy).

Forms and check lists available on the law website → resources SBA menu tab

→ Student Org. forms

Bon Appetit Guidelines

Tricia Matte: Catering Manager - tmatte@willamette.edu

Bon Appetit catering guide - cafebonappetit.com

- use GL# to pay for purchases directly with Bon Appetit
- debit, credit, or checks are accepted
- give 10 business days notice for orders
- you can get a 15% discount for events or orders that you pickup, setup, and cleanup yourselves
- pickup at the delivery entrance near the Mill Creek

Alcohol Policy

There are a limited number of student events where serving alcohol is appropriate. please visit with the deans prior to planning any events with alcohol.

- Organization budget money can be used for alcohol set up fees, but not to purchase alcohol
- Events with alcohol must be set up as a no host bar
- Drink tickets cannot be included with events that charge admission
- Advertised events that will offer alcoholic beverages must have all publicity approved - visit OSA for help
- Alcohol must only be served through the University's approved third party vendor, Bon Appetit or an OLCC licensed vendor

Alcohol Policy

- Alcohol use request form
 - submitted online 12 business days prior to the event
 - make reservation in EMS - form should pop us as option
- Contact security - once alcohol use form has been approved
 - Campus safety - Rich Dennis - rdennis@willamette.edu
 - no later than 10 business days before event date
 - provide GL# as well as event dates, times, and amount of attendees
- Non-alcoholic beverages and food must be served at all events
- Food in sufficient quantity must be available for the number of guests expected - Bon Appetit can assist with this
- Participants and Willamette guests must be prepared to produce identification verifying age status, when asked

Student Bar Association

SBA: "An organization for the control of all matters of general student concern."

President	Mohamad Shaer	-Preside over meetings. Carry out the SBA Constitution and Bylaws
1st Vice President	Gennifer Goldstein	-Run elections, oversee appointments to committees, conduct President meetings
2nd Vice President	Caitlin Tolleson	-Social chairperson
Secretary	David Schleiffers	-Minutes kept and posted
Treasurer	Devon Gonzalez-Yoxtheimer	-Keep accounting, chair budget committee, liaison with organization treasurers
Ombudsperson	Samantha Stanfill	-Contact with outside vendors budget committee member cleans refrigerators
ABA Liaison	Teddy Krolczyk	-Update on ABA issues/opportunities
JDA Representative	Amy Nelson	-Liasison with business school

The 1L, 2L, 3L Presidents each have a seat on the board. They have a bote and are responsible for bringing issues forward from each of the classes