

Instructions for creating a Purchase Requisition

Using the Ellucian (Datatel)
ERP solution

If you are connecting to the colleague system from on campus please go directly to the next slide.

If you are connecting from off campus you must first initialize a connection to the VPN. If you are unfamiliar with this process go to the link below:

<https://www.lakeheadu.ca/faculty-and-staff/departments/services/helpdesk/software/virtual-private-network>

1. Log In to MyInfo From the waffle icon menu. Select Web UI

The screenshot shows the Lakehead University MyInfo portal. The browser address bar displays <https://erpwp.lakeheadu.ca>. The left sidebar contains navigation links: Home, Applicant, Student, Employee, and Alumni. The main content area features a banner with pink flowers and the text "Good morning, I" and "You have 15060 unread email". Below the banner is an "Announcements" section with a date "November 16, 2019" and the title "Preparing for December 2019 Exams". The announcement text reads: "Important December Exam Information. It is not too early to start preparing for your December exams!". At the bottom, the first step of a list is visible: "1. Make sure you have a Lakehead University Student ID".

Annotations on the screenshot include:

- A blue arrow pointing to the "Waffle Menu" icon (a 3x3 grid of squares) in the top right corner of the page.
- A blue arrow pointing to the "Colleague - Web UI" option in the dropdown menu that appears after clicking the Waffle Menu.

The dropdown menu contains the following options:

- myCourseLink
- myEmail
- Library
- Romeo Research Portal
- Colleague - Web UI
- Helpdesk Ticket System
- MySuccess
- myCalendar
- myDrive
- Concur
- LinkedIn Learning

At the bottom of the page, there is a blue banner with the text: "Every day, each and every member of our staff and faculty has an impact on our students, communities, and real."

3. Purchase Requisitions

1. Click on Navigate

2. Select CF from the Application Drop down menu

3. Select PU – Purchasing

4. Select REQ from the Requisitions menu, Then Select REQM below

The screenshot displays the ellucian COLLEAGUE application interface. The top navigation bar includes the logo, a search bar, and a 'Navigate' button. Below the navigation bar, there is a 'BROWSE BY APPLICATION' section with tabs for UT, CORE, and CF. The CF tab is selected, and a list of applications is shown. The 'Purchasing - PU' application is selected, and a list of sub-applications is displayed. The 'Requisitions - REQ' application is selected, and a list of sub-applications is shown. The 'Requisition Maintenance - REQM' application is selected.

ellucian COLLEAGUE

Search for a Form...

Navigate

Log Out

BROWSE BY APPLICATION

UT CORE **CF**

- Accounts Payable - AP
- Budget Management - BU
- Fixed Assets - FX
- General Ledger - GL
- Purchasing - PU**
 - Vendor Maintenance - VEN
 - Approvals - APR
 - Requisitions - REQ**
 - Requisition Maintenance - REQM
 - Requisition Inquiry - RINQ
 - Requisition Item Summary - RQIS
 - Requisition Ship To Inquiry - RQSI
 - Requisition Single Print - RQSP
 - Purchase Orders - POM
 - Blanket Purchase Orders - BPM
 - Goods and Services Receiving - GSR
 - Procurement Dates Inquiry - DINQ
 - Vendor Voucher/Invoice Inq - VEII
 - Vendor Voucher/Invoice Select - VINQ
 - Communications Management - CC

4. Start Requisitions

The screenshot shows the 'ellucian COLLEAGUE' application interface. The main window is titled 'REQM - Requisition Maintenance'. A modal dialog box titled 'Requisition LookUp or (A)dd' is open, featuring a text input field with the placeholder 'Requisition LookUp or (A)dd' and buttons for 'OK', 'Cancel', 'Finish', and 'Help'. In the background, the main form includes fields for 'Requisition Date', 'Initiator' (highlighted with a red border), 'Desired Date', 'Maintenance Date', 'Requisition Amt', and 'Vendor ID'. A 'Types' dropdown menu is set to '1'.

Type the letter a and then hit the enter key.(To Add a new requisition)

This dialog box prompts the user with the text 'Enter "N"o Number or <ENTER> to assign automatically'. It contains a text input field with the same placeholder text and buttons for 'OK', 'Cancel', 'Finish', and 'Help'.

You will be prompted for N number, leave the field blank and hit the enter key then click ok on the following popup.

This is a confirmation dialog box with the message 'Number will be assigned automatically upon completion of Req'. It has a single 'OK' button at the bottom.

No Active Context. Search for People or open Favorites to get started

REQM - Requisition Maintenance

New Record

Save

Save All

Cancel

Cancel All

Requisition :

Status :

Status Date :

Requisition Date

17/07/27

Maintenance Date

Initiator

Desired Date

Hit the enter key to accept today's date

Enter your login name in the Initiator field and hit enter

Vendor ID

Name

Address

Cty/Pr/Pc

Country

Currency

Ship To

Ship Via

Types

1

Terms

FOB

Commodity

Approvals

Buyer

Expire Date

AP Type

Invn Store

Type the name of the vendor you wish to order from in the Vendor ID field and hit the enter key to search for your vendor.

ellucian COLLEAGUE

REQM: Requisition Maintenance

Navigate

Log Out

SEARCH RESULTS FOR : CORP

Vendors

Input

Open

1 Siemens Water Tech Canada Inc
ID: 0365254
PO Box 4219, Etn A
Toronto ON M5W 1R6
Source: CVEN

2 Siemens Canada Ltd
ID: 0005693
PO Box 4219, Etn A
Toronto ON M5W 5N1
Where Used: CDP,VEN
Source: CVEN

3
Where Used: APP,MAI,PER,STU,FIN,VEN
Source: CSTU

4
Where Used: APP,MAI,PER,STU,FIN,VEN
Source: CVEN

Doubleclick the vendor that matches your order.

*If the vendor is not on the list please go to Appendix A on Page 17 and follow the New Vendor Entry Process

5. Add Items to Requisition.

ellucian COLLEAGUE

REQM: Requisition Maintenance

No Active Context. Search for People or open Favorites to get started

REQM - Requisition Maintenance

New Record Save Save All Cancel Cancel All

Requisition : Status : Status Date :

Requisition Date 17/07/27 Maintenance Date

Initiator Requisition Amt

Desired Date

Vendor ID Types 1

Name 1

Address 1

Cty/Pr/Pc

Country

Currency

Ship To SR Shipping & Receiv

Ship Via

Terms

FOB

Commodity

Approvals 1

Buyer

Expire Date

AP Type

Invn Store

Line Items

Printed Comments 1

Comments 1

Priority

Requisition Done No

The vendor information will be filled in for you.

Now go to the Line Items Field and click the button.

ellucian COLLEAGUE

REQM: Requisition Maintenance

Log Out

No Active Context. Search for People or open Favorites to get started

REQM | RQIL - Requisition Item List

New Record Save Save All Cancel Cancel All

Requisition : Vendor : Siemens Canada Ltd


Status :

Status Date :

Description	No values	Estimated Price	Extended Price	Tax
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				

Taxes	Amounts
1	
2	

Item Total	0.00
Tax Total	0.00
Req Total	0.00

The RQIL tab will open.
Click on the  at item 1.



The RQIM tab will open.
Click the button at
line 1 of the Description
Field

No Active Context. Search for People or open Favorites to get started

REQM | RQIL | RQIM - Requisition Item Maintenance

New Record

Save

Save All

Cancel

Cancel All

Requisition :

Status :

Status Date :

Vendor Name 1 Siemens Canada Ltd

Commodity

Inv Item

Description

No Values

K <

1 of 1

> X

Description

1

2

Est Price

Quantity

Unit of Issue

Trade Disc Amt

Trade Disc Pct

Extended Price

Work Or/Type/Flg

Tax Codes

GL Account No

Percent

Desired Date

Fixed Asset

Vendor Part

Form/Box/Loc

Comments

1

Quantity

Enter a description for one of the items you
are ordering.

You can copy from an email or word document
and paste directly into this window.

REQUISITION ITEM MAINTENANCE

Save

Cancel

Timestamp

Download

Find...

Find Next

Item Description

When you are done
entering click
at the top of the screen

Save

ellucian COLLEAGUE

REQM: Requisition Maintenance

No Active Context. Search for People or open Favorites to get started

REQM | RQIL | RQIM - Requisition Item Maintenance

New Record Save Save All Cancel Cancel All

Requisition: Status: Status Date:

Vendor Name 1 Siemens Canada Ltd

Commodity

Inv Item Description No Values K < 1 of 1 > X

Description 1

2

Est Price

Quantity

Unit of Issue

Trade Disc Amt

Trade Disc Pct

Extended Price

Work Or/Type/Flg

Tax Codes 1

Desired Date

Fixed Asset

Vendor Part

Form/Box/Loc

Comments 1

GL Account No

Percent

Quantity

1

GL Amt

Proj ID

Enter the estimated price for this item as well as the quantity you are ordering. Then enter the GL code you wish to charge the purchase to.

When entering GL account info, use underscores to separate numbers for example:

11_10_51200000_61220

Or enter partial info:

11_10_5120...

The ellipses(...) will call a lookup function allowing you to pick the account you wish to use from a list.

Tax Codes 1

GL Account No

1 11-10-17510000-61220

100.000 1.000

181.51 150.00 US


Element GL Accounts

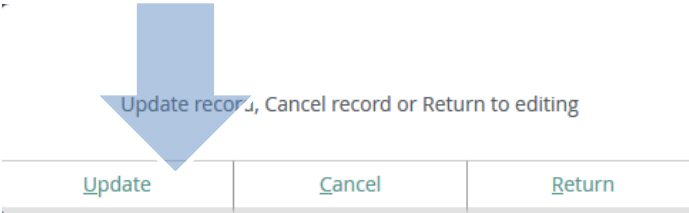
New Record

Value 1/1

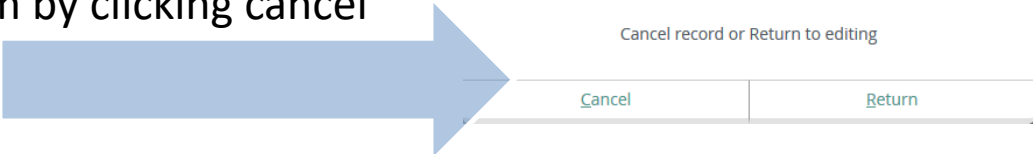
Enter the quantity in this field equal to the quantity in the above field.

When you are done entering GL information click  then Update


The screen will blank out, allowing you to enter information about the next item on your shopping list. Once you have entered all items, simply click  on the top menu bar.

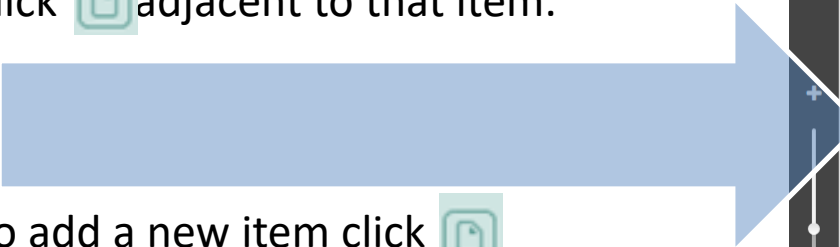



Confirm by clicking cancel



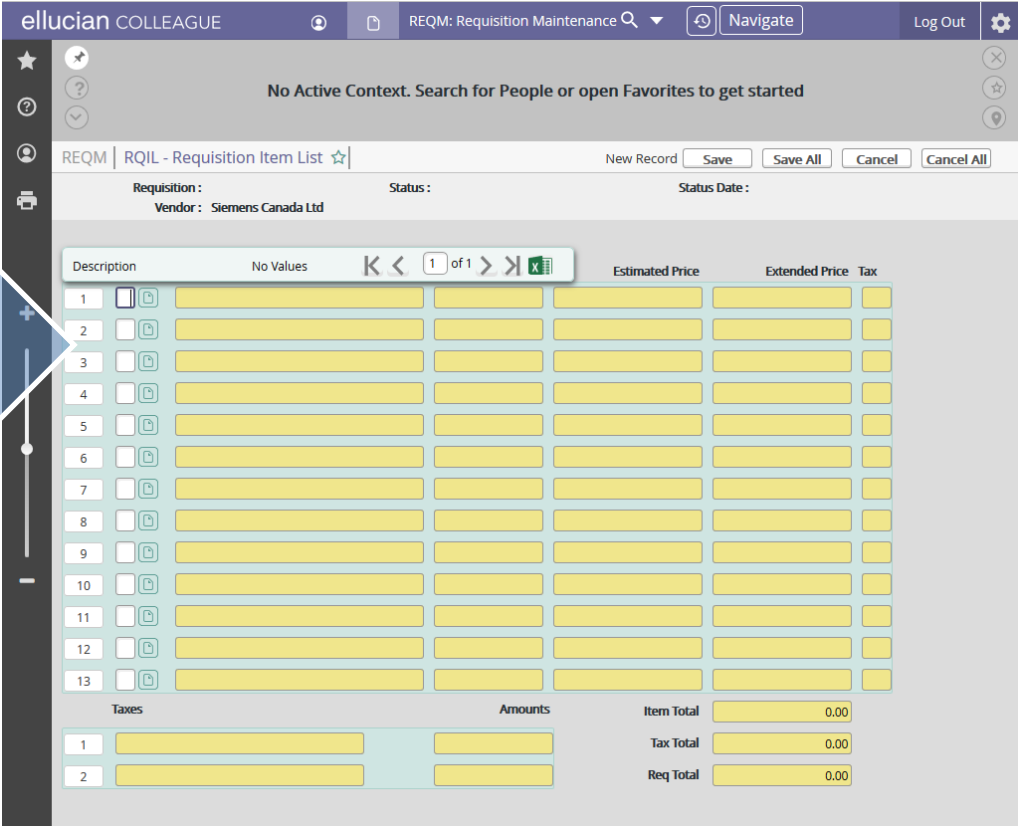
You will be returned to the RQIL screen and may review your shopping list.

To make changes to an item click  adjacent to that item.



To add a new item click  adjacent to a blank line.

Once you are done click 



ellucian COLLEAGUE REQM: Requisition Maintenance

No Active Context. Search for People or open Favorites to get started

REQM | RQIL - Requisition Item List

New Record Save Save All Cancel Cancel All

Requisition: Vendor: Siemens Canada Ltd Status: Status Date:

Description	No Values	Estimated Price	Extended Price	Tax
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				

Taxes Amounts

Taxes	Amounts
1	
2	

Item Total 0.00
Tax Total 0.00
Req Total 0.00

6. Add Approver

You must now enter Approvals for your requisition.

ellucian COLLEAGUE

REQM: Requisition Maintenance

Log Out

No Active Context. Search for People or open Favorites to get started

REQM - Requisition Maintenance

New Record Save Save All Cancel Cancel All

Requisition : Status : Status Date :

Requisition Date 17/07/27 Maintenance Date

Initiator Requisition Amt

Desired Date

Vendor ID Types 1

Name 1

Address 1

Cty/Pr/Pc

Country

Currency

Ship To SR Shipping & Receiv

Ship Via

Terms

FO3

Commodity

Approvals 1

Buyer

Expire Date

AP Type


Invn Store

Line Items

Comments 1

Priority

Requisition Done No

Click on the  button, the Approval tab will be displayed.

Enter the login ID of the approval required the Next Approvers field: Please refer to the Approval Authority Policy to determine the required approval.
(Should you require the Vice Presidential Level Approval here are the current login IDs: dcomuzzi for Deb Comuzzi, kpozihun for Kathy Pozihun, apdean for Andrew Dean, dbarnet1 for David Barnett)

The screenshot displays a software interface for 'REQUISITION MAINTENANCE Authorizations'. The top menu bar contains a 'New Record' button and four action buttons: 'Save', 'Save All', 'Cancel', and 'Cancel All'. Below the menu bar, there is a section for 'Next Approvals' with a 'No Values' status. The main area features a table with two columns: 'Approvals' and 'Dates'. The 'Approvals' column has 12 rows, each with a dropdown menu and a text input field. The 'Dates' column has 12 rows, each with a date input field. A blue callout box highlights the first three rows of the 'Approvals' column, and a white arrow points from this box to a 'Next Approvals' form on the right. The 'Next Approvals' form has five rows, each with a dropdown menu and a text input field.

Approvals	Dates
1	
2	
2	
4	
5	
6	
7	
8	
9	
10	
11	
12	

Next Approvals
1
2
3
4
5

Then click on the top menu bar.

You will be returned to the REQM main screen.

GO to the last field in the bottom right hand corner: Requisition Done

Type the letter Y over the N which is there by default then click
On the popup click

Save

Appendix A. New Vendor Entry

REQM - Requisition Maintenance ☆

New Record Save Save All Cancel Cancel All

1 of 1

Name No Values

Requisition : Status : Status Date :

Requisition Date 19/06/07

Maintenance Date

Initiator Mr. Patrick J. Larin

Requisition Amt

Desired Date

Vendor ID

Types 1

Name 1

Address 1

Country

Currency

Ship To SR Shipping & Receiv

Ship Via

Enter the street address NO PUNCTUATION

Enter the vendor name then hit Enter key

Enter the city, Enter Key, province, Enter Key, postal code Enter Key.
HINT: Enter postal code in the city field if already in the system will fill all the information out for you!

Once you have entered City, Province, Postal code, you can ignore the other fields and go directly to Line Items (page 8)