

# 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 dated November 16, 2019, titled "Preparing for December 2019 Exams" and "Important December Exam Information".

Two blue arrows with white text provide instructions:

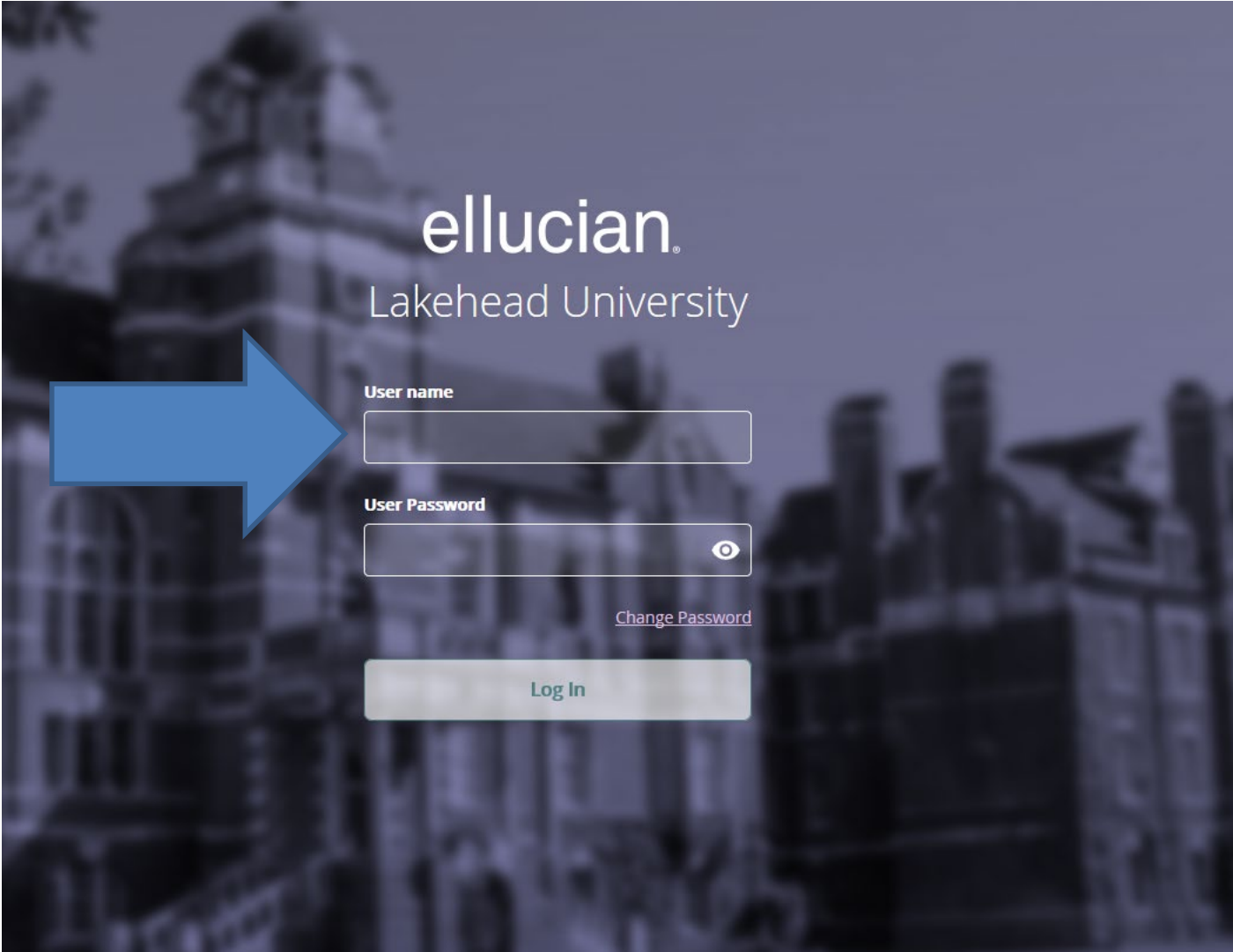
- The first arrow points to the "Waffle Menu" icon (a 3x3 grid of squares) in the top right corner of the page.
- The second arrow points to the "Colleague - Web UI" option in the dropdown menu that appears after clicking the Waffle Menu.

The dropdown menu also includes 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, the text "1. Make sure you have a Lakehead University Student ID" is visible.

## 2. Log in using your Ellucian Credentials. Ex: rsmith



The image shows the login page for Ellucian Lakehead University. The background is a dark, blurred image of a university building. The text 'ellucian.' is in white, with 'Lakehead University' below it. There are two input fields: 'User name' and 'User Password'. A large blue arrow points to the 'User name' field. Below the password field is a 'Change Password' link. At the bottom is a 'Log In' button.

ellucian.  
Lakehead University

User name

User Password

[Change Password](#)

Log In

# 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. At the top, there is a header bar with the text "ellucian COLLEAGUE", a search bar, and a "Navigate" button. Below the header, there is a "BROWSE BY APPLICATION" section with tabs for "UT", "CORE", and "CF". The "CF" tab is selected. Under the "CF" tab, there is a list of applications: "Accounts Payable - AP", "Budget Management - BU", "Fixed Assets - FX", "General Ledger - GL", "Purchasing - PU", "Vendor Maintenance - VEN", "Approvals - APR", "Requisitions - REQ", "Purchase Orders - POM", "Blanket Purchase Orders - BPM", "Goods and Services Receiving - GSR", and "Communications Management - CC". The "Requisitions - REQ" application is highlighted. Below "Requisitions - REQ", there is a list of sub-applications: "Requisition Maintenance - REQM", "Requisition Inquiry - RINQ", "Requisition Item Summary - RQIS", "Requisition Ship To Inquiry - RQSI", and "Requisition Single Print - RQSP". The "Requisition Maintenance - REQM" sub-application is highlighted.

## 4. Start Requisitions

ellucian COLLEAGUE

REQM - Requisition Maintenance

Requisition LookUp or (A)dd

Requisition LookUp or (A)dd

OK Cancel Finish Help

Requisition Date

Initiator

Desired Date

Maintenance Date

Requisition Amt

Vendor ID

Types 1

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

Enter "N"o Number or <ENTER> to assign automatically

Enter "N"o Number or <ENTER> to assign automatically

OK Cancel Finish Help

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

Number will be assigned automatically upon completion of Req

OK

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

Initiator

Desired Date

Maintenance 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.

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REQM: Requisition Maintenance

Navigate

Log Out

SEARCH RESULTS FOR : CORP

Vendors

Input

Open

1 Siemens Water Tech Canada Inc  
ID: 0365254

2 Siemens Canada Ltd  
ID: 0005693

3

4

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

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

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

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

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.

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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.

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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
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

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

### REQUISITION ITEM MAINTENANCE

Save

Cancel

Timestamp

Download

Find...

Find Next

Item Description

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.

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

Save

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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 Armt

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 Armt

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

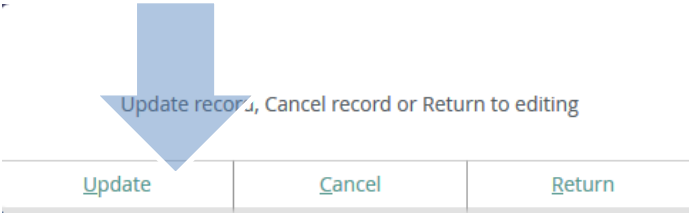
New Record

Value 1/1

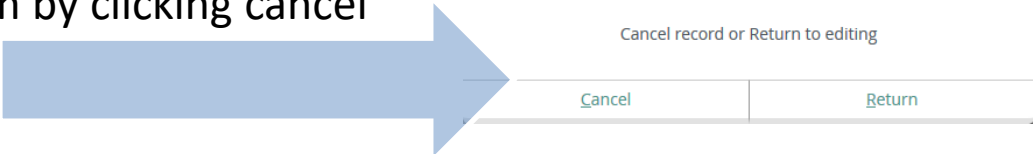
Enter the quantity in this field equal to the quantity in the above field.

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.

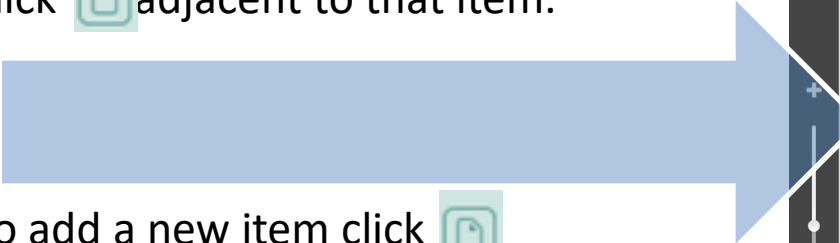



Confirm by clicking cancel



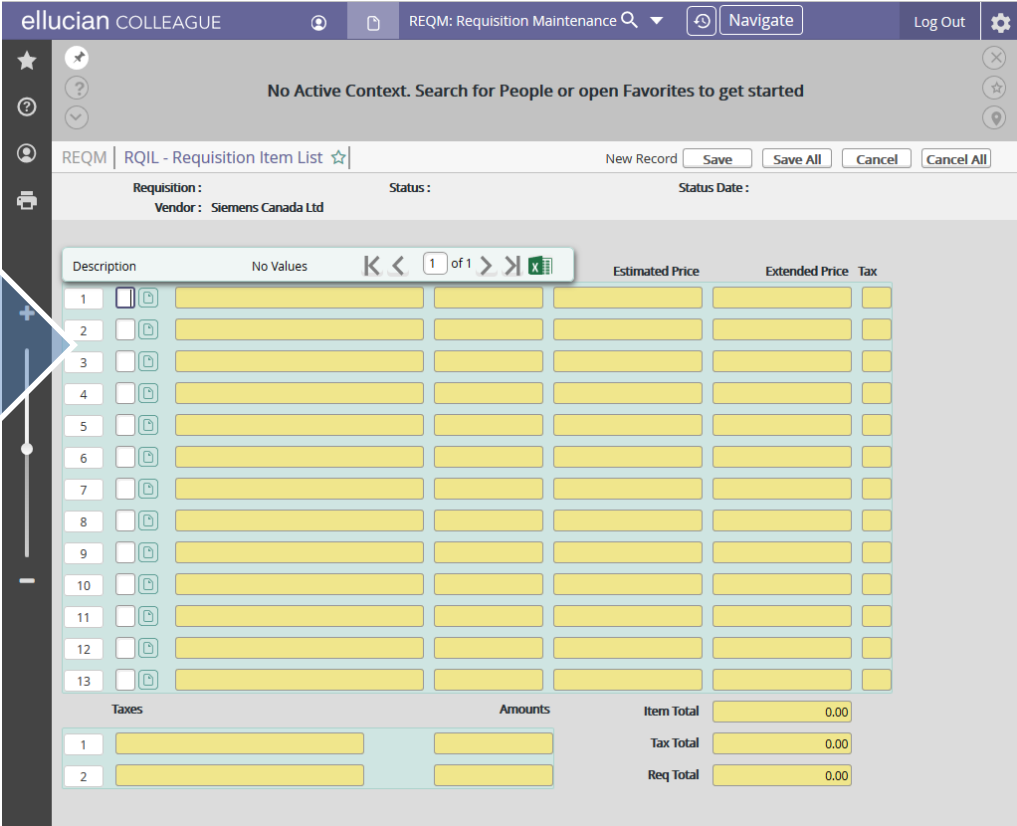
You will be returned to the RQIL screen and may review your shopping list.

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 



# 6. Add Approver

You must now enter Approvals for your requisition.

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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: denhaan for Mike den Haan, kpozihun for Kathy Pozihun, apdean for Andrew Dean, dbarnet1 for David Barnett)

The screenshot displays the 'REQUISITION MAINTENANCE Authorizations' window. The top bar includes a search prompt 'No Active Context. Search for People or open Favorites to get started' and buttons for 'New Record', 'Save', 'Save All', 'Cancel', and 'Cancel All'. Below this, the 'Next Approvals' section is highlighted with a blue arrow pointing to a dropdown menu. The main area contains a table with two columns: 'Approvals' and 'Dates'. The 'Approvals' column has 12 rows, each with a dropdown menu. The 'Dates' column has 12 rows, each with a date field. A blue arrow points from the first row of the 'Approvals' column to the 'Next Approvals' dropdown menu.

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

Next Approvals

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

ellucian COLLEAGUE

REQM: Requisition Maintenance

Navigate

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 :

Requisition Date

17/07/27

Initiator

Desired Date

Maintenance Date

Requisition Amt

Vendor ID

Name

Address

City/Pr/Pc

Country

Currency

Ship To

Ship Via

Types

1

Terms

FOB

Commodity

Approvals

1

Buyer

Expire Date

AP Type

Invn Store

Line Items

Printed Comments

Comments

Priority

Requisition Done

No

Save

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



Congratulations!



# 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

Address

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)