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**Purchasing Department**  
Lincoln Hall Room 403B  
484-365-7344

# Self-Service Requisition Training

Requisition Input, Editing, Tracking, Returns, Deletion and Budget to Actuals

**Mission:** Lincoln University, the nation's first degree-granting Historically Black College & University (HBCU), educates and empowers students to lead their communities and change the world.



This document is to assist with the process of creating and submitting requisitions in Ellucian Self-Serve.

To access Ellucian Self-Serve our IT department recommends using Google Chrome as your web browser.

<https://lincoln-ss.colleague.elluciancloud.com/Student/?hideProxyDialog=false>

To login to the Self-Serve Environment use your LU email username and password.

The following information and forms are available on our Website:

University Purchasing Policies, New Vendor Form, Personal Services Form, Envelope Order Form and a copy of these instructions.

<https://www.lincoln.edu/departments/purchasing>

**The credentials are:**

**Username: lincoln**

**Password: purchasing**



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# Create Your Requisition

Inputting Check Request & Purchase Orders

**Mission:** Lincoln University, the nation's first degree-granting Historically Black College & University (HBCU), educates and empowers students to lead their communities and change the world.



## Click on the Financial Management Module

Hello, Welcome to Lincoln University Self-Service!

Choose a category to get started.



**Course Catalog**

Here you can view and search the course catalog.



**Financial Management**

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



## Click The Procurement Module

### 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.



#### Procurement

Here you can create and maintain your procurement documents.



# The Following Fields Will Auto Populate

## **Document**

Should always state “Requisition”

## **Requisition Date**

Current Date

## **Approvers**

This depends on the Department Code

## **Initiator**

Your Name or Number

## **Confirmation Email Address**

Your email address



## You MUST Input All Required Information

### Printed Comments

Enter your Quote Number or Invoice Number ONLY

### Internal Comments

Enter Department to Deliver Items for Receiving ONLY

### Ship To

LU – Main Campus  
PH Lincoln Univ SACE

### Vendor

Enter Vendor Name or Number

### AP Type

CR – Check Request  
PO - Purchase Order

**\*Incorrect AP Type will delay your Order or Payment.\***



# Enter information from your Quote, Invoice or Personal Service Form

Procurement

View **Create**

**Warning:** 11/3/2023 falls beyond the current fiscal year.

Document Type \*  
Requisition

Requisition Date \*  
11/3/2023

Initiator  
Initiator Lookup  
Annette Matthews

Confirmation Email Address \*  
amattews@lincoln.edu  
Add email addresses separated by commas

Ship To \*  
LU Lincoln University

Vendor ID  
Vendor Lookup

AP Type  
None

Approvers	Approval Date
Next Approver Lookup	

Printed Comments

Internal Comments

**Items**

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price
------------	-------------	-------------	----------	------	-------	----------------

Add Item

Cancel Save Save and Attach



## Entering Line Item in the Requisition

### Items

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price	
------------	-------------	-------------	----------	------	-------	----------------	--

### New Item

Description *		Vendor Part	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Quantity *	Unit	Price	Extended Price
<input type="text"/>	None	<input type="text"/>	\$0.00
GL Account *		Project	
<input type="text" value="Search by GL Account..."/>		None	
Quantity	Percent	Amount	GL Remaining Balance
<input type="text" value="0.000"/>	<input type="text" value="100.000"/>	<input type="text" value="0.00"/>	

Add GL Account

Cancel

Add Item

Cancel

Save

Save and Attach



## You MUST Input All The Required Information

### Adding Lines

Enter all related information from your Invoice, Quote or PSF with Part/Item Numbers in the Description.

**\*COPY AND PASTE IS NOT ACCEPTED\***

### \*Grant Related GL Account Codes Requires the Grant-Related Project\*

GL Account *	Project
<input type="text" value="20-1-6003001-71006"/>	<input type="text" value="GT22014   SP"/>
<small>20-1-6003001-71006 Title III HBCU-22 Activity I : Reference Materials</small>	

### Attachments

#### \*PDF ONLY\*

Quote for Purchase Orders (PO) or Invoice for Check Request (CR) or Personal Service Form (PSF).

Click "Save and Attach" A dialogue box will pop up on your screen to attach the document.

**\*Be sure your supporting document is attached and not corrupt\***



## Examples of Attachments

 **Lincoln University**  
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Purchasing Department  
1570 Baltimore Pike  
Lincoln University, PA 19352-0969  
484-365-7248 - phone

**Personal Services Form**

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

Name: \_\_\_\_\_ ID #: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Vendor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Purpose: \_\_\_\_\_  
\_\_\_\_\_

Amount: \$ \_\_\_\_\_ Department or Program: \_\_\_\_\_

Dept. Head / Director / PI Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Notice: Lincoln University, the nation's first degree-granting historically Black Baptist institution, is an equal opportunity institution. Lincoln University, the nation's first degree-granting historically Black Baptist institution, is an equal opportunity institution. Lincoln University, the nation's first degree-granting historically Black Baptist institution, is an equal opportunity institution.

 **Lincoln University**  
1570 Baltimore Pike  
Lincoln University, PA 19352  
Phone: 484-365-7228 Fax: 484-365-4187

Quote No. QUOTE000011908

**QUOTE**

Customer: 309-1120122 - Lincoln University  
Name: Lincoln University  
Address: 1570 Baltimore Pike  
POI: 8024-118  
City: Lincoln University State: PA Zip: 19352  
Phone: 484-365-6903  
Fax:

Me: \_\_\_\_\_  
Date: 11/05/2023  
PC#: Academic Affairs  
Term: NET50  
Expense: 03545034

Qty	Description	Tax Rate	Unit Price	TOTAL
10	Chick Oni Balls Meat/Vegetarian -Turkey, Tuna, & Mixed Vegetables  Cheese - American, Pepper Jack - Keweenaw Chips - Assorted Beverages (soft, water)	6.00%	14.00	174.75
2	Coke Brew or Beer	6.00%	9.00	18.00
<b>Comments:</b> Trol Bldg Room 4739 CETS Room 27100 Location DR 214, Team 026			<b>Subtotal</b>	<b>\$192.75</b>
Customer Signature: _____			<b>Tax</b>	<b>\$18.00</b>
			<b>TOTAL</b>	<b>\$210.75</b>

Please call 484-365-7228 with any questions regarding this quote.

THANK YOU FOR YOUR PATRONAGE



Buddha Stretch LLC  
168-136 Dr. MLK JR BLVD #599  
Newark NJ 07102

**INVOICE NO. 14** 9/24/2023

Bill To: \_\_\_\_\_  
Company name: Buddha Stretch LLC  
Lincoln University  
1570 Baltimore Pike  
Lincoln University, PA  
19352

Bill To: \_\_\_\_\_  
165 Mulberry Street #1109  
Newark NJ 07102  
Account # 444-0612304  
Swift Code: BUDHUS33XXX  
Routing # 031201568

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
400	Meal Discussion	\$1.00	\$200.00
SALES TAX			
SHIPPING & HANDLING			
<b>TOTAL</b>			<b>\$200.00</b>

Thank you for your business!



## Examples of Attachments For American Express Orders Vendor #102



Call 1-800-338-3346 M-F 8:00 am - 4:30 pm CT

Resources Account 2 Items

### Cart



[Posh Parisian Arch Kit](#)

In Stock

Item #: z2G1

Production Time: 7 Business Days  
Each

Base Price: \$214.99 each

[Remove](#)

Qty:

1

[Update](#)

Price

\$214.99



[Delightful Lightful Eiffel Tower Kit](#)

In Stock

Item #: z3AA1

Production Time: 7 Business Days  
Each

Base Price: \$729.99 each

[Remove](#)

Qty:

1

[Update](#)

Price

\$729.99

SAVE 10%

### Codes

Priority Code

Promotion Code

[Apply codes](#)

### Order Summary

Subtotal - 2 Items \$944.98

Shipping & Handling \$355.39

Estimated Tax \$0.00

Order Total \$1,300.37

[Checkout](#)



American Association of Colleges & Universities

### AAC&U MEMBERSHIP INVOICE July 01, 2023 - June 30, 2024

Dr. Brenda A. Allen, Ph.D.  
President  
The Lincoln University  
1570 Baltimore Pike  
P.O. Box 179  
Lincoln University, PA 19352

Invoice Number: 101403-FY24  
Invoice Date: May 03, 2023  
Due Date: July 31, 2023

Product Code	Product Title	Amount Due
MBR	AAC&U Membership Dues	\$6,500.00
PT	Presidents' Trust Dues	\$750.00
<b>Total</b>		<b>\$7,250.00</b>

I am only paying for my Institutional Dues.

I am paying for both my Institutional and Presidents' Trust Dues.

**AAC&U Federal Identification Number is 52-1945674**

#### By Credit Card

Enter your credit card information below and send to memberservices@aacu.org. Upon charge of the card, a receipt will be emailed to you.

Credit Card Type (circle one):  Visa  MasterCard  American Express

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Billing Zip Code: \_\_\_\_\_ CVV: \_\_\_\_\_

Name on Card: \_\_\_\_\_

#### By Check

**Include a copy of the invoice with your check and reference the above invoice number on the check to ensure proper credit.** Checks should be made payable to AAC&U and mailed to:

American Association of Colleges and Universities  
P. O. Box 745732  
Atlanta GA 30374-5732

#### By ACH

Routing (ABA) #: 121000248  
Account #: 2090002190366

**Include the above invoice number on your ACH payment and send remittance advice to payments@aacu.org to ensure proper credit.**

*Annual college and university membership dues are set by the AAC&U Board of Directors and are based on institutional FTE to help ensure equity among institutional members.*

**Please direct all general correspondence, questions, or concerns to:**

**AAC&U Membership Team**  
1818 R Street NW, Washington, DC 20009  
Phone: (202) 387-3760  
Email: memberservices@aacu.org

FY24-1



## Applying Discounts

Save Requisition and Reopen.

Click “Additional Details” where you will be able to enter the discount Amount or Percent.

### Additional Details

Commodity

Tax Form

Box Number

State

Trade Discount Amount

Trade Discount Percent

Fixed Asset

Line Item Comments



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# Modifying Your Requisition

Editing, Tracking, Returns and Deleting

**Mission:** Lincoln University, the nation's first degree-granting Historically Black College & University (HBCU), educates and empowers students to lead their communities and change the world.



## Editing Requisitions

Click your Requisition Number the “Requisition Detail” box will pop open, this is where you can edit the requisition by clicking on the pencil to open the lines. Please “SAVE” changes once editing is complete.

!

November 6: Veterans Only  
 November 7-8: 75+ Completed Credits, Athletes, Band, Choir, and Honors  
 November 9-10: 45+ completed credits  
 November 13-14: 30+ completed credits  
 November 15-17: 0-29 completed credits  
 November 20 - December 8: remains open for all students  
 Advising begins on October 19th, schedule an appointment with your advisor prior to your registration date  
[Calendar](#)

Procurement

View   Create
Filter
Collapse All

Document Types: Requisition, Purchase Order, Payment Request

Requisition ^

Requisition Date	Requisition		Total	Approvers/Next Approvers
11/21/2023	<a href="#">0006303</a> <span style="background-color: #fff9c4; border: 1px solid #ccc; padding: 2px;">Not Approved</span> 0000202 CDW Government Inc.		\$106.09	Marion Bernard-Amos

**Requisition Details** X

0006303 [Pencil](#) | [Delete](#)

Overview   Approvers   Line Items

---

**Status** Not Approved

**Vendor** 0000202 CDW Government Inc.

**Amount** \$106.09

**Maintenance Date** 11/21/2023

**Initiator** Annette Matthews

**Requestor** Annette Matthews

**Attachments** View 1

---

**Additional Details** v

Printed Comments

Quote # 1CCPJXC

Internal Comments

Deliver to Biology



## Requisition Tracking for Approvers “Not Approved”

Click on your Requisition Number, a summary of your requisition pops up.

You can click the ‘Approvers’ for Approval Status to know who still has to approve your requisition

November 6: Veterans Only  
 November 7-8: 75+ Completed Credits, Athletes, Band, Choir, and Honors  
 November 9-10: 45+ completed credits  
 November 13-14: 30+ completed credits  
 November 15-17: 0-29 completed credits  
 November 20 - December 8: remains open for all students  
 Advising begins on October 19th, schedule an appointment with your advisor prior to your registration date  
[Calendar](#)

**Procurement**

View Create

[Filter](#) [Collapse All](#)

Document Types: Requisition, Purchase Order, Payment Request

Requisition Date	Requisition	Total	Approvers/Next Approvers
11/21/2023	<a href="#">0006303</a> <span>Not Approved</span> 0000202 CDW Government Inc.	\$106.09	Marion Bernard-Amos

Requisition Details ✕

[0006303](#) [Delete](#)

Overview **Approvers** Line Items

**Status** Not Approved

**Vendor** 0000202 CDW Government Inc.

**Amount** \$106.09

**Maintenance Date** 11/21/2023

**Initiator** Annette Matthews

**Requestor** Annette Matthews

**Attachments** [View 1](#)

**Additional Details** ▾

Printed Comments

Quote # 1CCPJXC

Internal Comments

Deliver to Biology



## Requisition Tracking Once “PO is Created”

Click on your Requisition Number, a summary of your requisition pops up.

You can click the Purchase Order Number for all information related to the requisition including the Attachments.

11/7/2022	<a href="#">0001595</a>	PO Created	0000102 American Express Company		\$857.98	Yeda Arscott <span>+2</span>
-----------	-------------------------	------------	----------------------------------	--	----------	------------------------------

Requisition Details ✕

0001595

Overview Approvers Line Items

---

**Status** PO Created

**Vendor** 0000102 American Express Company

**Amount** \$857.98

**Maintenance Date** 11/7/2022

**Initiator** Annette Matthews

**Requestor** Annette Matthews

**Purchase Orders** [P0001448](#)

**Attachments** View 2

---

**Additional Details** ▾

Printed Comments

Best Buy Order #BBY01-806692754244

Internal Comments

Please contact Yeda upon delivery x5147



## Correcting Your Returned Requisitions

Click on requisition number a box will pop up with a message explaining in the “Internal Comments” why it’s has been returned. (see arrow below)

Click the pencil next to the requisition number to make the correction and re-submit.

Spring 2024 registration is returning:  
November 6: Veterans Only  
November 7-8: 75+ Completed Credits, Athletes, Band, Choir, and Honors  
November 9-10: 45+ completed credits  
November 13-14: 30+ completed credits  
November 15-17: 0-29 completed credits  
November 20 - December 8: remains open for all students  
Advising begins on October 19th, schedule an appointment with your advisor prior to your registration date  
[Calendar](#)

Procurement

View Create

Filter Collapse All

Document Types: Requisition, Purchase Order, Payment Request

Requisition Date	Requisition	Total	Approvers/Next Approvers
10/30/2023	<a href="#">0006023</a> <span>Returned</span> 0223026 THG Transport, Inc.	\$49,259.68	✓ Harry Stinson

### Requisition Details

0006023 [Delete](#)

Overview Approvers Line Items

**Status** Returned

**Vendor** 0223026 THG Transport, Inc.

**Amount** \$49,259.68

**Maintenance Date** 10/30/2023

**Initiator** Jill Ciabattoni

**Requestor** Jill Ciabattoni

**Attachments** [View 1](#)

### Additional Details

Printed Comments  
Womens Basketball Travel

Internal Comments 

[11/15/2023 07:26 Diane Brown]  
Returning per Harry's request.



## Deleting Requisitions

Click your Requisition Number the “Requisition Detail” box will pop open, this is where you can delete your requisition

November 6: Veterans Only  
 November 7-8: 75+ Completed Credits, Athletes, Band, Choir, and Honors  
 November 9-10: 45+ completed credits  
 November 13-14: 30+ completed credits  
 November 15-17: 0-29 completed credits  
 November 20 - December 8: remains open for all students  
 Advising begins on October 19th, schedule an appointment with your advisor prior to your registration date  
[Calendar](#)

**Procurement**

View Create

[Filter](#) [Collapse All](#)

Document Types: Requisition, Purchase Order, Payment Request

**Requisition**

Requisition Date	Requisition	Total	Approvers/Next Approvers
11/21/2023	<a href="#">0006303</a> <span style="border: 1px solid #ccc; padding: 2px;">Not Approved</span> 0000202 CDW Government Inc.	\$106.09	Marion Bernard-Amos

**Requisition Details** ✕

[0006303](#) | [Delete](#)

Overview Approvers Line Items

**Status** Not Approved

**Vendor** 0000202 CDW Government Inc.

**Amount** \$106.09

**Maintenance Date** 11/21/2023

**Initiator** Annette Matthews

**Requestor** Annette Matthews

**Attachments** [View](#) 1

**Additional Details** ▾

Printed Comments

Quote # 1CCPJXC

Internal Comments

Deliver to Biology



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# Budget to Actuals

## Understanding your Budget

**Mission:** Lincoln University, the nation's first degree-granting Historically Black College & University (HBCU), educates and empowers students to lead their communities and change the world.



## Click The Budget to Actuals Module

### 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.



#### Procurement

Here you can create and maintain your procurement documents.



## Understanding Your Budget

Click Department and Enter your seven (7) digit department GL Code, then click 'Apply Filter'

Budget to Actuals

My Cost Centers   Object View

Filter

Fund

Location

Department

Object

Include Active Accounts with No Activity

Apply Filter

Reset Filter   Save Criteria

Apply a filter to see the results.



## Understanding Your Budget

Your Department Budget will populate.

Budget to Actuals

My Cost Centers Object View

Filter

Department: 6351005

Fund	Cost Center	Budgeted Expenses	Actuals and Encumbrances	Remaining Expenses	% Spent	Financial Health
	6351005 Purchasing	\$5,894.00	\$3,683.26	\$2,210.74	62 %	✓

Department value or range ⓘ

6351005 x

FY2024 Export

Click on your Department Number to find funds you may want to move to another unfunded line for purchase.



## Understanding Your Budget

This is an overview of how the Department Funds are allocated. To Reallocate Funds contact David Hendricks

6351005 Purchasing FY2024

[My Cost Centers](#)

Department: 6351005

6351005 Purchasing	Budget	Actuals	Encumbrances	Remaining	% Received/ Spent	Financial Health
Expense	\$5,894.00	-\$46.38	\$3,729.64	\$2,210.74	62 %	✓
710 Supplies and Office Expense	\$650.00	\$0.00	\$0.00	\$650.00	0 %	✓
720 Professional Services	\$988.00	\$0.00	\$0.00	\$988.00	0 %	✓
730 Travel	\$4,256.00	-\$46.38	\$3,729.64	\$572.74	87 %	⚠
732 Professional Development/Dues	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓
790 Other Expenses	\$0.00	\$0.00	\$0.00	\$0.00	0 %	✓



# Contact

## Purchasing Department

Annette Matthews  
Purchasing Agent

T: 484-365-7344

[amatthews@lincoln.edu](mailto:amatthews@lincoln.edu)

<https://www.lincoln.edu/departments/purchasing>

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