



Lincoln University
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www.lincoln.edu

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

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"/>		
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

Name: _____ Date: _____
 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 the only college or university in the United States to be owned and operated by a church. Lincoln University is an equal opportunity employer.

 **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
 P.O. Box 119
 City: Lincoln University State PA Zip 19352
 Phone: 484-365-4903
 Fax:

Me: _____
 Date: 11/05/2023
 PC#: Academic Affairs
 Term: NET50
 Email: 05145234

Qty	Description	Tax Rate	Unit Price	TOTAL
10	Chick Oni Baffle Meal/Vegetarian -Turkey, Tuna, & Mixed Vegetables Chicken - American, Poppy Seed - Homemade Chips - Assorted Breads (incl. rolls)	0.00%	14.00	140.00
2	Eggs Eggs or Rice	0.00%	9.00	18.00
Grand Total				\$158.00
Tax				\$0.00
TOTAL				\$158.00

Comments: Tui Robinson 4739
 CETS Team 27146
 Location DR 214, Team 214

Customer Signature: _____

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 #1189
 Newark NJ 07102
 Account # 444-0612394
 SWIFT Code: BUDDUS33XXX
 Routing # 031201568

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
400	Meal Discussion	\$0.00	\$0.00
SALES TAX			
SHIPPING & HANDLING			
TOTAL			\$0.00

Thank you for your trust and



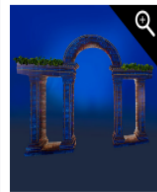
Examples of Attachments For American Express Orders Vendor #102



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

Resources Account 2 Items

Cart

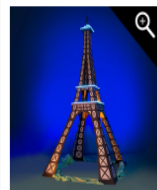


[Posh Parisian Arch Kit](#)

In Stock
Item #: z2G1
Production Time: 7 Business Days
Each
Base Price: \$214.99 each

[Remove](#)

Qty: 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: Price: **\$729.99**

SAVE 10%

Codes

Priority Code

Promotion Code

Order Summary

Subtotal - 2 Items **\$944.98**
Shipping & Handling **\$355.39**
Estimated Tax **\$0.00**
Order Total \$1,300.37



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
Total		\$7,250.00

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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Lincoln Hall Room 403B
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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	0006303 Not Approved 0000202 CDW Government Inc.		\$106.09	Marion Bernard-Amos

Requisition Details ✕

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 ▼

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	0006303 Not Approved 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	0001595	PO Created	0000102 American Express Company		\$857.98	Yeda Arscott +2
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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	0006023 Returned 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	0006303 Not Approved 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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Lincoln Hall Room 403B
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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

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

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