

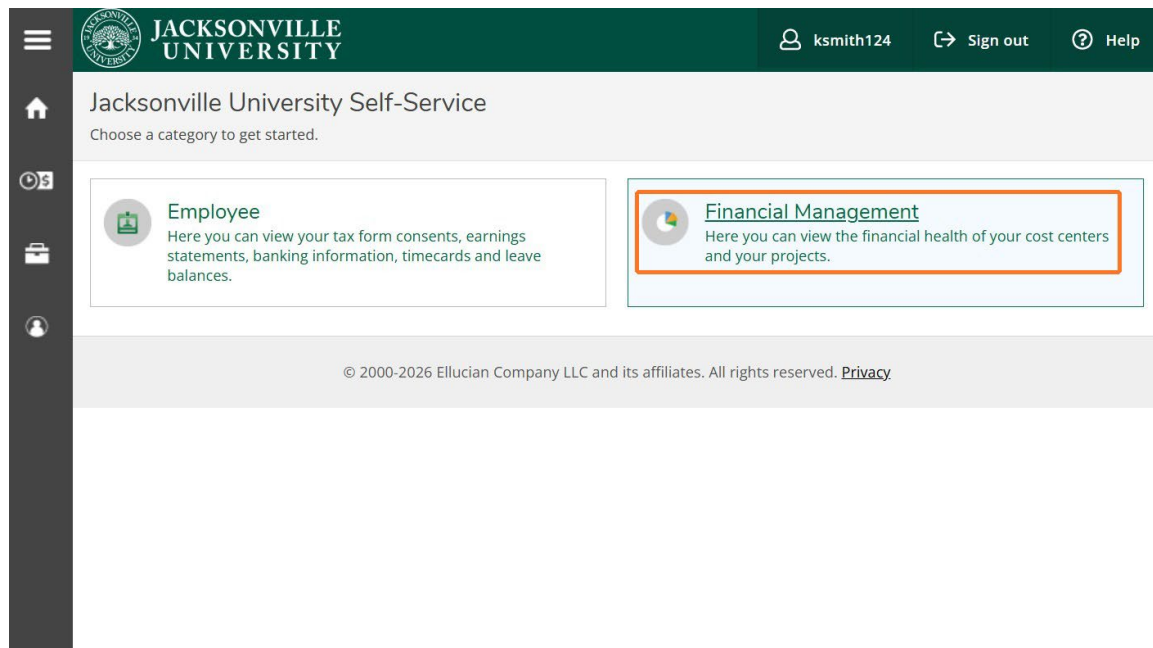


How to Create a Requisition in Colleague Self Service

Learn the step-by-step process for generating a new request within the JU Ellucian Financial Management portal, Colleague Self Service.

Open Procurement

1. Navigate to <https://jvile-ss.colleague.elluciancloud.com/Studentlogin> using your JU network username and password, and click "Financial Management"



Tip! The View screen will display all the requisitions you've created.



2. Click "Procurement"

The screenshot shows the 'Financial Management Overview' dashboard. The breadcrumb trail is 'Daily Work > Financial Management > Financial Management Overview'. The dashboard contains six tiles: 'Approve Documents', 'Budget to Actuals', 'Finance Query', 'Receive Goods and Services', 'Budget Development', and 'Procurement'. The 'Procurement' tile is highlighted with an orange border. The footer text reads: '© 2000-2026 Ellucian Company LLC and its affiliates. All rights reserved. [Privacy](#)'.

3. Click "Create"

The screenshot shows the 'Procurement' page. The breadcrumb trail is 'Daily Work > Financial Management > Procurement'. The page has a header with the Jacksonville University logo, the user 'ksmith124', and links for 'Sign out' and 'Help'. Below the breadcrumb, there are 'View' and 'Create' tabs, with 'Create' circled in orange. A 'Filter' button is visible. Below the tabs, a message states 'No Requisitions to view.' under the 'Requisition' section. The 'Purchase Order' section is partially visible at the bottom, showing a table with columns for 'Purchase Order' and 'Total'.



Set Requisition Details

4. Complete the header level information that applies to the whole requisition.

The screenshot shows the 'Set Requisition Details' form with several fields and annotations:

- Document Type ***: A dropdown menu with 'Requisition' selected. A callout box states: 'Document Type: Always leave the default Document Type of "Requisition"'. A green checkmark is next to the selected value.
- Requisition Date ***: A text field containing '9/17/2026'. A callout box states: 'Requisition Date: The "Requisition Date" will default to today's date; however, you can change it using the calendar icon'. A calendar icon is circled in orange to the right of the field.
- Initiator**: A dropdown menu with 'Initiator Lookup' selected. A callout box states: 'Initiator: The initiator will default to the user drafting the requisition. This user will be the one who has access to receive the PO.' Below this, a tag 'Kasey Smith' is visible.
- Confirmation Email Address ***: A text field containing 'KSMITH124@JU.EDU'. A callout box states: 'Confirmation Email Address: This is the person who will be notified of the PO. You can add multiple email addresses.' Below the field, it says 'Add email addresses separated by commas'.
- Ship To ***: A text field that is currently empty.

A calendar widget is open, showing 'September 2026' with a grid of dates from 30 to 3.

5. Your Ship To address will default to the post office.

The screenshot shows the 'Set Requisition Details' form with the following fields and annotations:

- Confirmation Email Address ***: A text field containing 'KSMITH124@JU.EDU'. Below the field, it says 'Add email addresses separated by commas'.
- Ship To ***: A dropdown menu with 'CR Jacksonville University' selected. A callout box states: 'Ship To: This will default to JU Central Receiving (CR), which is the Post Office'. A green checkmark is next to the selected value.
- Vendor ID**: A text field with 'Vendor Lookup' and a search icon.
- AP Type**: A dropdown menu with 'CAP Chase Accounts Payable' selected. A green checkmark is next to the selected value.

At the bottom of the form, there are two columns: 'Approvers' and 'Approval Date'.



6. Type the vendor's full or partial name in the Vendor ID field and press Enter or click the magnifying glass icon.

Kasey Smith x

Confirmation Email Address *

KSMITH124@JU.EDU

Add email addresses separated by commas

Ship To *

CR Jacksonville University v

Vendor ID

bsn sport

BSN Sports 0393217
PO Box 841393 Dallas TX 75284-1393
(CK-Check)

AP Type

CAP Chase Accounts Payable v

Approvers

Approval Date

Vendor Name:
Type in either the full or partial vendor name to search the Colleague database. The vendor must be registered in Colleague before a requisition can be submitted.



Tip! Try different variations of the vendor's name to search. For Example, with BSN Sports, you may search for "BSN."

7. The AP Type should default to "CAP Chase Accounts Payable," if not, please select CAP.

Vendor ID

Vendor Lookup

BSN Sports 0393217 x

Address

PO Box 841393 Dallas TX 75284-1393
(CK-Check)

AP Type

RAP Regions Accounts Payable v

None

CAP Chase Accounts Payable

CVB Recurring Vouchers-Bank-Chase

CVW Recurring Vouchers-Chase

RAP Regions Accounts Payable

Approval Date



Add Line Item

8. Add any comments directed at the vendor such as the quote number to the "Printed Comments" field. Notes to help support and justify your purchase should be entered into the "Internal Comments" field.

Then, click "Add Item."

Next Approvers

Next Approver Lookup

Printed Comments

Internal Comments

Items

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

Add Item

Cancel Save and Attach



Tip! We recommend using line items to match the vendor's quote. For example, if I'm purchasing jerseys and shoes, I would have one line item for jerseys and one for shoes. You can put a whole purchase into one line item, especially for services.

9. Complete your "Description" and add a "Vendor Part Number" if applicable; however, this isn't a required field.

New Item

Description *

Jersey Shirts

Description: Please be description enough that the vendor and requisition approvers know what is being purchased.

Vendor Part

Quantity *

Unit

None

Price

Extended Price

\$0.00

GL Account *

Search by GL Account...

Quantity

Percent

Amount

GL Remaining Balance



10. Enter your Quantity and Price. The extended price should match the vendor's quote for that item.

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price
	Jersey Shirts		15	None		\$0.00

Quantity and Price:
These two fields are multiplied by Colleague to create the total to be encumbered for that line item. However, the Quantity limits how many times you can receive.

For blanket POs, where you know the price, but have an undetermined quantity, set the quantity field as the total of your encumbrance, with a price of \$1. In this scenario, you would receive the quantity based on the total of each invoice.

GL Account *
Search by GL Account...

Quantity Percent Amount GL Remaining Balance

Creating the Blanket Purchase Order

When you have situations with undetermined quantities, a blanket PO may be the best fit. For example, you know you spend \$10,000 on catering with Aramark each fiscal year. The cost will change depending on the number of people and what food we select. This allows us to encumber this money to set it aside for our catering needs. Based on your historical spend (available in Colleague Self Service, Financial Query) or estimates created during the budget process.

When creating the requisition:

- Enter your **estimated total annual spending** for that GL.
- Enter the estimated annual dollar amount in the **Quantity** field.
- Enter **\$1.00** as the **Unit Price**.

Example:

If you anticipate spending **\$10,000** during FY27, enter:

- **Quantity:** 10,000
- **Unit Price:** \$1.00

This creates a purchase order with a total value of **\$10,000** while allowing the purchase order to be received up to **10,000 times**, providing flexibility to receive each job separately.



11. In the "GL Account" field, begin entering your funding information. As you type, a dynamic search will appear that will change as you continue typing.

The screenshot shows a procurement system interface. At the top, there is a search bar with the text "jersey shirts". Below it is a "Vendor Part" field. A table displays the following information:

Quantity *	Unit	Price	Extended Price
15	None	200.0000	\$3,000.00

Below the table is a "GL Account *" field. An orange oval highlights the dropdown menu that appears as the user types. The dropdown shows the following options:

- 1100631507
- 11-00-63150-77145
Main Campus : Purchasing : Software Licenses
- 11-00-63150-77150
Main Campus : Purchasing : Software Maint Contracts
- 11-00-63150-79100
Main Campus : Purchasing : Office Supplies
- 11-00-63150-79110

To the right of the dropdown is a "GL Remaining Balance" field.



Tip! Your account code is made up of 4 different fields.

In this example:

11=Fund

Different fund codes denote different funding sources, such as operating, revenue, grant, capital, etc. Most purchases are under the operating fund 11.

00=Location

This denotes the main campus. Currently, all purchases are at location 00.

63150=Unit

Your unit indicates your department. In this example, 63150, corresponds to the Purchasing department.

79100=Object Code

The object code describes the expenditure. In this example, 79100, describes that this purchase is for office supplies.



12. Once you select your accounting information, the system will provide your GL Remaining Balance, which is your balance with this line item deducted. When done, click "Add Item."

Quantity * 15 Unit None Price * 200.0000 Extended Price \$3,000.00

GL Account * 11-00-63150-79100 11-00-63150-79100 Main Campus : Purchasing : Office Supplies

Quantity * 15.000 Percent * 100.000 Amount * 3000.00

GL Remaining Balance \$8,811.21

Add GL Account Cancel Add Item



Tip! If you need to break out a line item into different funding sources, click "Add GL Account" to enter the additional funding information. You can allocate the split by percent or amount.



Save and Verify

13. You can continue to add line items, as needed. When finished, click "Save and Attach."

Internal Comments

Items

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price	
1	Jersey Shirts		15.000		\$200.0000	\$3,000.00	

[Add Item](#)

[Cancel](#) [Save and Attach](#)

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14. Click "Choose File" and upload your Requisition Support Form and all other supporting documentation (quotes, contact documents, etc.).

Attachments

Upload new attachment

[Choose File](#) No file chosen [Upload](#) [Clear](#)

Accepted File Types: (.pdf,.jpg,.png,.gif,.bmp,.bm,.tif,.tiff)

Maximum File Size: (20 MB)

No attachments found.

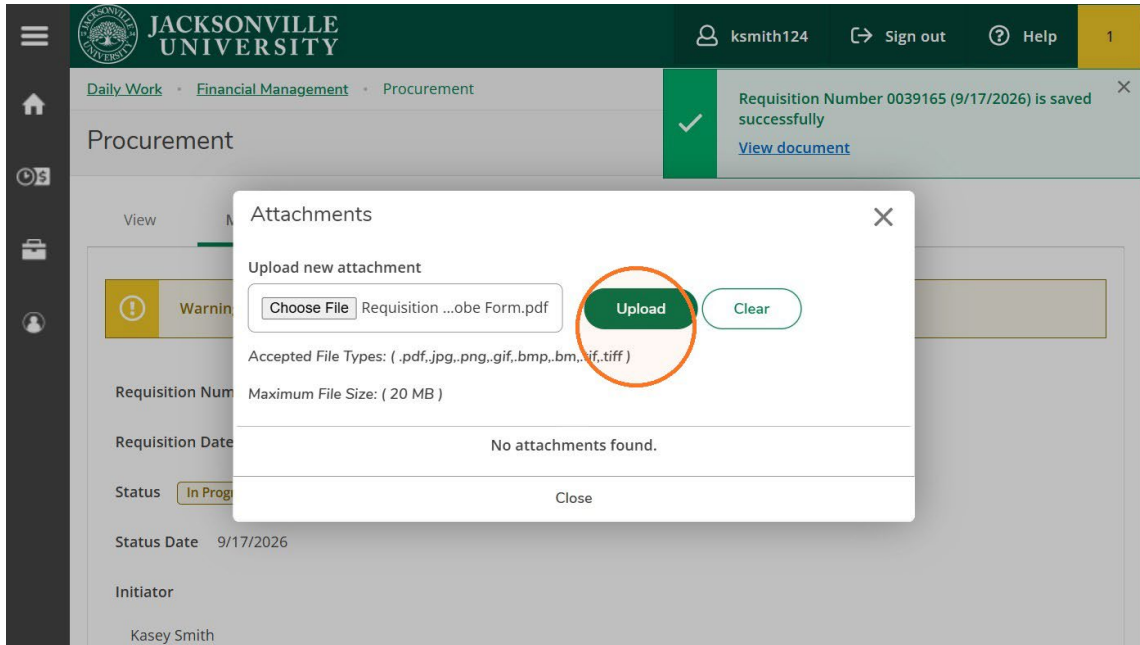
[Close](#)

Requisition Number 0039165 (9/17/2026) is saved successfully

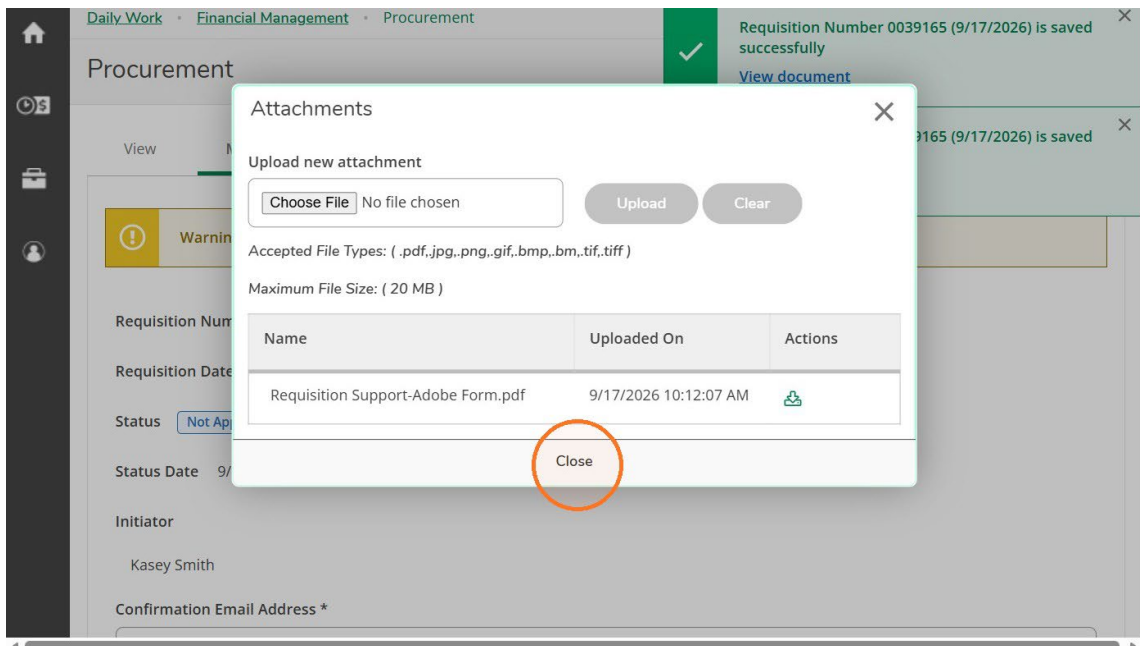
[View document](#)



15. Once you have uploaded your file, click "Upload."



16. After attaching all your supporting documentation, click "Close."





17. You're done! The requisition will be automatically routed to the approver based on the type of purchase, dollar value, and your assigned departmental group. You can view the completed document by clicking "View document."

The screenshot shows the Jacksonville University Procurement system interface. The top navigation bar includes 'Daily Work', 'Financial Management', and 'Procurement'. The main heading is 'Procurement'. Below this, there are tabs for 'View' and 'Modify'. A warning message states: 'Warning: 9/17/2026 falls beyond the current fiscal year.' The requisition details are as follows:

Requisition Number	0039165
Requisition Date	9/17/2026
Status	Not Approved
Status Date	9/17/2026
Initiator	Kasey Smith
Confirmation Email Address *	

Two success messages are displayed on the right side of the form, both stating 'Requisition Number 0039165 (9/17/2026) is saved successfully' with a 'View document' link. The second 'View document' link is circled in orange.

18. Throughout the approval process you can review the status of your requisitions by clicking on the requisition number and reviewing the "Approvers".

The screenshot shows the Jacksonville University Procurement system interface for Requisition 0039165. The top navigation bar includes 'Daily Work', 'Financial Management', and 'Procurement'. The main heading is 'Requisition 0039165'. The requisition details are as follows:

Status	Not Approved	Date	9/17/2026
Vendor	0393217 BSN Sports	Status Date	9/17/2026
Amount	\$3,000.00	Desired Date	
Maintenance Date	9/17/2026	AP Type	CAP Chase Accounts Payable
Initiator	Kasey Smith		
Requestor	Kasey Smith		

There is a button labeled 'View' with a document icon and a count of 1. Below this, there are sections for 'Printed Comments' and 'Internal Comments'. The 'Approvers' table is highlighted with an orange box:

Approvers	Approval Date
✓ Kasey Smith	9/17/2026
⚠ Nicole Watts	Awaiting Approval

At the bottom of the screen, there is a table with columns: Line Items, Description, Quantity, Unit, Price, and Extended Price.



Managing a PO

Paying for Goods/Services

After each delivery/job/event:

- Receive the goods/services in Self-Service.
- Have the vendor submit the invoice to accountspayable@ju.edu, or they can send it to you to forward on.
- Ensure the invoice references the **correct purchase order**. If the PO has multiple lines with different GL account codes, please reference the line item where the charges should be applied.

Managing If Your Spending Changes

If your original PO is either too low or higher than needed, simply submit the Change/Close Order Request Form, referencing the PO number with the increase or decrease to the blanket purchase order amount.

Monitoring Your Available Balance

Departments can monitor the remaining balance on their blanket purchase orders by using the **Colleague Self-Service Financial Query**.

Review the applicable GL to compare:

- **Encumbered Funds** (remaining blanket PO balance)
- **Expended Funds** (amount already spent)