How to Create a Purchase Requisition (PR) in Colleague

REQM
(Type REQM on search box)

REQM
(To add Requisition)

1. Type an: **A to add/create a requisition**.

2. A pop-up will display: **Click OK or just enter button on keyboard.**

3. A pop-up will display: **click OK**

4. A pop-up will display: **Click Y**

REQM
(Input data to create Requisition)

1. Requisition Date: **Current Date**

2. Initiator: **Type your employee id**

3. Vendor ID: **Type vendor name**

If vendor does not exist, send W9 and TSC vendor application completed to Purchasing at purchasing@tsc.edu

4. Buyer:
   - ➢ **Nilda Mora for Travel**
   - ➢ **Patricia Saldivar for Goods & Svcs**

5. AP Type: **Type an A**

6. Line Items: **Click on magnifying glass**

REQM
(RQIL tab to add line items)

1. Click on magnifying glass on first line item.

(RQIM Tab to add line in detail)

1. Go to "Description" field: **Click on magnifying glass.**

2. A pop-up will display: **Enter description of item to purchase or purpose of travel.**

3. When done entering "Description": **Click on SAVE.**

4. Go to "Est Price" field: **Enter price of item.**

5. Go to "Quantity" field: **Enter the qty.**

6. Go to "Unit of Issue" field: **Enter … this will open a pop-up and it will display the units of measure.**

7. Go to "GL Account No" field: **Enter the gl account number and press the tab button on keyboard.**
   1. If the gl acct does not exist a pop-up box will display with this message. PLEASE STOP and contact Ms. Berta Orive.
   2. If the gl acct is inactive a pop-up box will display with this message. PLEASE STOP and contact Ms. Berta Orive.
   3. If the gl acct is over budget a pop-up box will display with this message. PLEASE STOP and contact Ms. Claudia Cortina.

8. If gl acct has no issues click on: **SAVE & UPDATE after each line item.**

9. If you are done entering items click on: **Cancel twice.**

10. Click on: **SAVE & UPDATE**

(RQIL tab to review of line items entered before saving)

Once you are done with entering all line items this screen will give you a summary of what you entered.

1. Click on: **SAVE & UPDATE.**

REQM

Please verify the information is correct if so,

1. Click on: **SAVE & UPDATE**

2. A pop-up will display with Requisition # please make sure to note it. As it will be needed when printing requisition.

RQSP
(To print PR)

1. Enter Req #

2. Click on: **OK or hit the Enter on keyboard**.

3. Click on: **SAVE ALL**.

RQSP cont…

1. Click on: **Output Device and type H to hold/browse file output.**

2. Click on: **SAVE ALL.**

REPORT BROWSER WINDOW
(To print in PDF Format via BullZip printer)

1. Click on: **Export PDF.**

2. Click on: **Create PDF.**

Next Screen ...Merge of PDF Browser to TSC PR template

1. Click on: **PRINT.**
2. Print box will display
3. Choose **Bullzip PDF Printer**
4. Click on: **PRINT.**
5. Bullzip PDF Printer box will display
6. Click on: **Merge Tab**
7. Click on: **Background PDF**
8. Choose: **TSC Purchase Requisition**
9. Click on: **SAVE**
10. Click on: **PRINT**

TSC Purchase Requisition

1. Add "Purpose of Purchase" and Bidding Information as instructed.

2. Add back-up documents such as quote, travel information, etc.

3. Send it for signature as appropriate.

The End