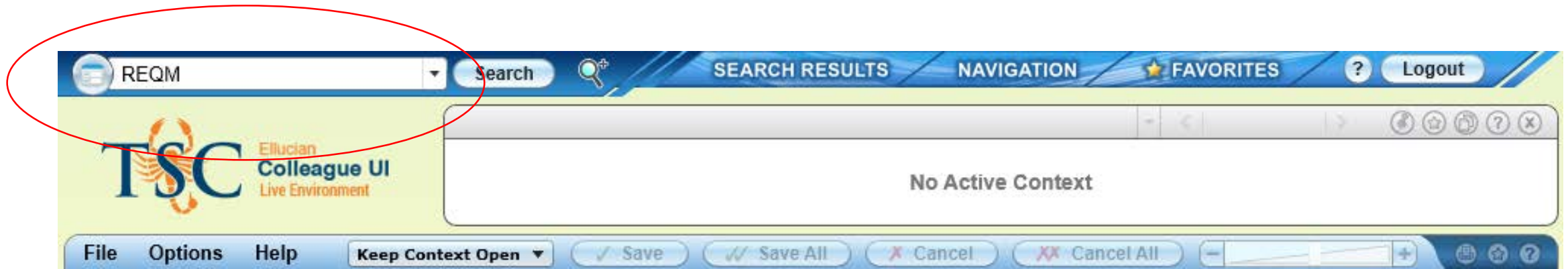




How to Create a Purchase Requisition (PR) in Colleague



REQM: Requisition Maintenance (Type REQM on search box)



Press: ENTER





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: Requisition Maintenance

SEARCH RESULTS NAVIGATION FAVORITES Logout

Ellucian Colleague UI
TSC Live Environment

File Options Help Auto-Close Context

REQM - Requisition Maintenance

Requisition :

Requisition Date
Initiator
Desired Date

Vendor ID
Name
Address
CTY/ST/ZP
Country
Currency
Ship To
Ship Via

Approvals
Buyer
Expire Date
AP Type
Invn Store

Line Items
Printed Comments
Comments
Priority
Requisition Done

1. Requisition LookUp or (A)dd
A
OK Cancel Finish Help

2. Enter new Req No, "N"o Number, <ENTER> to assign automatically
OK Cancel Finish Help

3. Number will be assigned automatically upon completion of Req
OK

4. 04/01/17 falls in a future month. Accept Date? (Y,N)
Y N



REQM (Input data to create Requisition)

1. Requisition Date: Current Date
2. Initiator: Type your employee id
3. Vendor ID: Type vendor name

**TIP: IN CASE YOU CHOSE THE WRONG
VENDOR USE SHORTCUT KEY:
CTRL+ALT+D TO DELETE SELECTION.**

**NOTE: 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.

REQM: Requisition Maintenance Search SEARCH RESULTS NAVIGATION FAVORITES Logout














Ellucian Colleague UI Live Environment

No Active Context

File Options Help Auto-Close Context Save Save All Cancel Cancel All

REQM - Requisition Maintenance RQIL - Requisition Item List

Requisition : Status : Status Date :
Vendor : Mr. Alberto Vasquez

	Description	Quantity	Estimated Price	Extended Price	Tax
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					

Taxes	Amounts	Item Total
1		0.00
2		0.00
		Tax Total 0.00
		Req Total 0.00

Controller Description New Record No Values

(RQIM Tab to add line in detail)

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

NOTE: DEPENDING ON THE LENGTH OF DESCRIPTION, IT CAN APPEAR IN MORE THAN ONE LINE.

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.
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

REQM: Requisition Maintenance Search SEARCH RESULTS NAVIGATION FAVORITES ? Logout

Ellucian Colleague UI Live Environment

No Active Context

File Options Help Auto-Close Context Save Save All Cancel Cancel All

REQM - Requisition Maintenance RQIL - Requisition Item List RQIM - Requisition Item Maintenance

Requisition : Status :

Vendor Name 1 Mr. Alberto Vasquez

Commodity

Inv Item

Description 1 TRAVEL EXPENSE ATTEND 2 '2017 RGV SYMPOSIUM' @

Est Price 30.0000

Quantity 1.000

Unit of Issue EA Each

Trade Disc Amt

Trade Disc Pct

Extended Price 30.00

Work Or/Type/Flg

Tax Codes 1

GL Account No 1 11-1-100-133151-551130

Percent 100.000

Quantity 1.000

GL Amt 30.00

Proj ID

Fixed Asset

Vendor Part

Form/Box/Loc

Comments 1

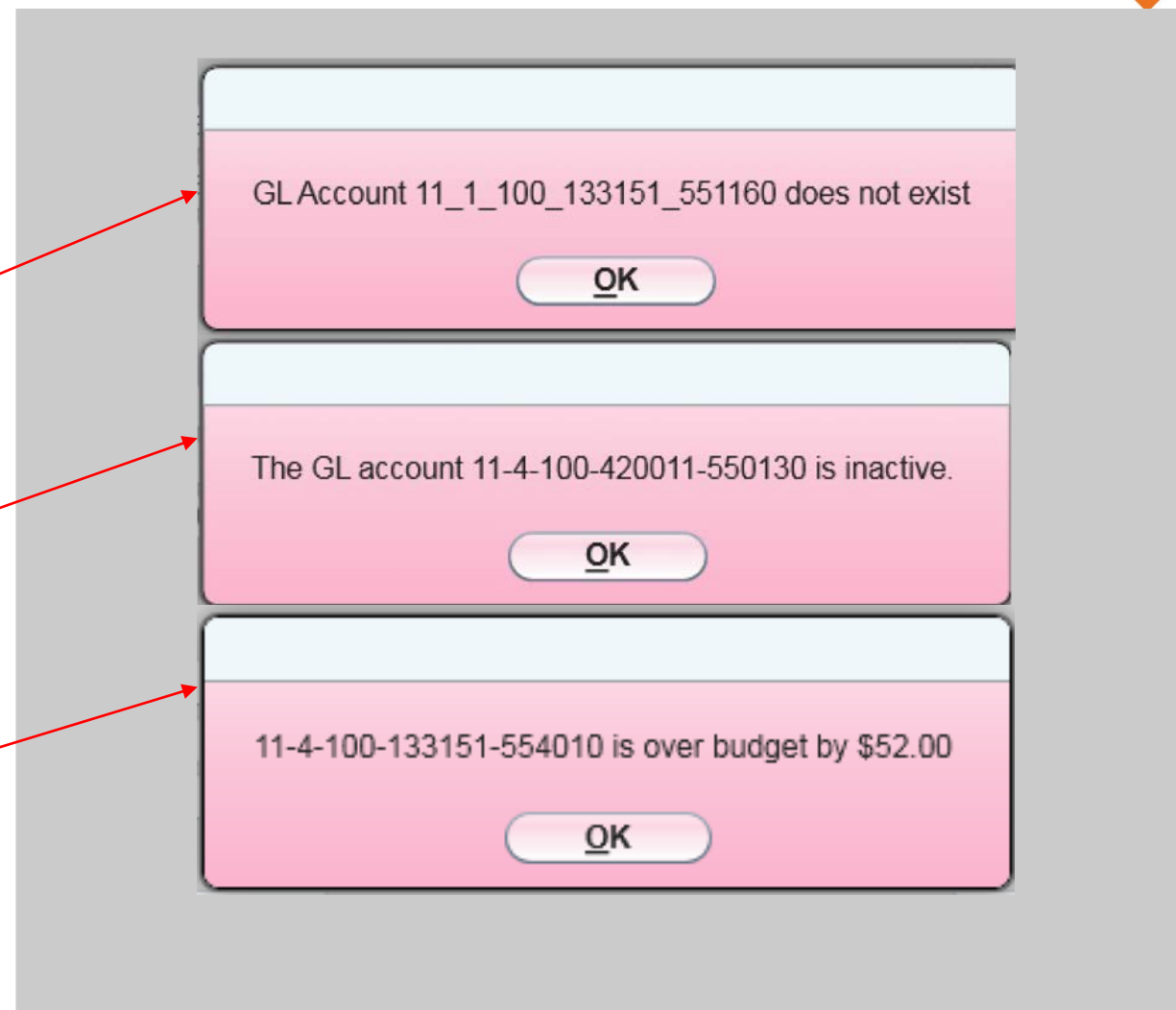
Controller Description Commodity Codes LookUp

New Record Value 1/2



Possible GL issues:

- If the GL acct does not exist a pop-up box will display with this message. **PLEASE STOP** and contact Ms. Berta Orive.
- If the GL acct is inactive a pop-up box will display with this message. **PLEASE STOP** and contact Ms. Berta Orive.
- If the GL acct is over budget a pop-up box will display with this message. **PLEASE STOP** and contact Ms. Claudia Cortina.





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

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

1. Click on: SAVE.
2. Click on: UPDATE.

REQM: Requisition Maintenance Search SEARCH RESULTS NAVIGATION FAVORITES Logout

Ellucian Colleague UI Live Environment No Active Context

File Options Help Auto-Close Context Save Save All Cancel Cancel All

REQM - Requisition Maintenance RQIL - Requisition Item List

Requisition : Status : Status Date : Vendor : Mr. Alberto Vazquez

	Description	Quantity	Estimated Price	Extended Price	Tax
1	TRAVEL EXPENSE ATTEND	1.000	30.0000	30.00	
2	MILEAGE	1.000	32.5300	32.53	
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					

Update record, Cancel record or Return to editing

Update Cancel Return

Taxes	Amounts	Item Total
1		62.53
2		0.00
		Req Total 62.53

Controller Description Value 2/2



REQM

Please verify the information is correct if so,

1. Go to “Printed Comments” click on the magnifying glass: Enter Quote#, if applicable.

2. Click: Save

3. Change Requisition Done from **No** to **Yes**. (This way the funds are encumbered.)

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

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

Ellucian Colleague UI
Live Environment

No Active Context

File Options Help Auto-Close Context Save Save All Cancel Cancel All

REQM - Requisition Maintenance

Requisition : 0017094 Status : In Progress Status Date : 04/03/17

Requisition Date 04/03/17 Maintenance Date
Initiator Mr. Armando Ponce Requisition Amt 222.13
Desired Date

Vendor ID 1483336
Name 1 Anderson's
Address 1 P O Box 115
CTY/ST/ZP Minneapolis
Country
Currency Terms
Ship To CR Tsc Central Recei FOB
Ship Via Commodity

Approvals 1
Buyer Ms. Nilda M. Mora
Expire Date
AP Type A REGULAR ACCOUNTS PAYABL
Invn Store

Line Items 4
Printed Comments 1
Comments 1
Priority
1. Requisition Done No

This Requisition has been assigned a Number of 0017079
OK



How to Print a Purchase Requisition (PR) in Colleague



RQSP: Requisition Single Print (Type RQSP on search box)



Press: ENTER





RQSP (To print PR)

1. Enter Req #
2. Click on: OK or hit the Enter on keyboard.
3. Click on: SAVE ALL.

Note: If you don't remember the PR Number you have the following options:

Option 1: Go to RQSP and use shortcut key: Ctrl + @.

Option 2: Go to Pneumonic RINQ use shortcut key: Ctrl + @.

RQSP: Requisition Single Print

Search

SEARCH RESULTS

NAVIGATION

FAVORITES

Logout

Ellucian Colleague UI Live Environment

No Active Context

File Options Help Auto-Close Context Save Save All Cancel Cancel All

RQSP - Requisition Single Print

Requisition : Status : Status Date :

Initiator

Vendor Name 1 2 3

Req. Date

Desired Date

Expire Date

Printed Comments

Requisitions LookUp

17079

OK Cancel Finish Help

Description	Quantity	Unit Price	Extended Price
1			
2			
3			
4			
5			
6			
7			
8			

Requisition Amt



RQSP cont...

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

RQSP: Requisition Single Print

SEARCH RESULTS NAVIGATION FAVORITES Logout

No Active Context

File Options Help Keep Context Open Save Save All Cancel Cancel All

RQSP - Requisition Single Print

Peripheral : SETPTR.RQSP.25560 Description : Requisition Print

Process : RQSP Description : Requisition Single Print

Output Device H Hold/Browse File Output

Printer

Form Name

Banner

Security PB Public

Copies 1

Defer Time

Other Options

1 NOEJECT

2 NFMT

3 NOHEAD

Page Width 132

Page Length 66

Top Margin 0

Bottom Margin 0

Max Pages per PDF

Printer LookUp



REPORT BROWSER WINDOW

(To print in PDF Format via PDF Writer printer)

1. Click on: Export PDF.
2. Click on: Create PDF.

Note: Requisition will appear on a new TAB

Report Browser

1 of 1

Save As Export PDF Print Remote

0016419 12/20/16

Ward's Natural Science Est. L1
PO Box 92912
Rochester NY 14692-9012

Ms. July C. Enriquez
Ms. Nilda M. Mora

QTY	Unit	Issue	Vendor Part	Description	Price	Ext Price
35.000	EA	Each		MICROSCOPE ITEM#242240 BINOCULAR 32_1_100_829355_559340	667.5000	23,362.50
1.000	EA	Each		HP STIRRER ITEM#159993 ANALOG CERAMIC TOP 32_1_100_829355_559340	363.2000	363.20
				32.1.100.829355.559340		

Export to PDF

Formatting Options

Font: Courier Font Size: 10.0

Orientation: ☒ Portrait ☐ Landscape

Paper Size: Letter

Create PDF Use Defaults Cancel



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

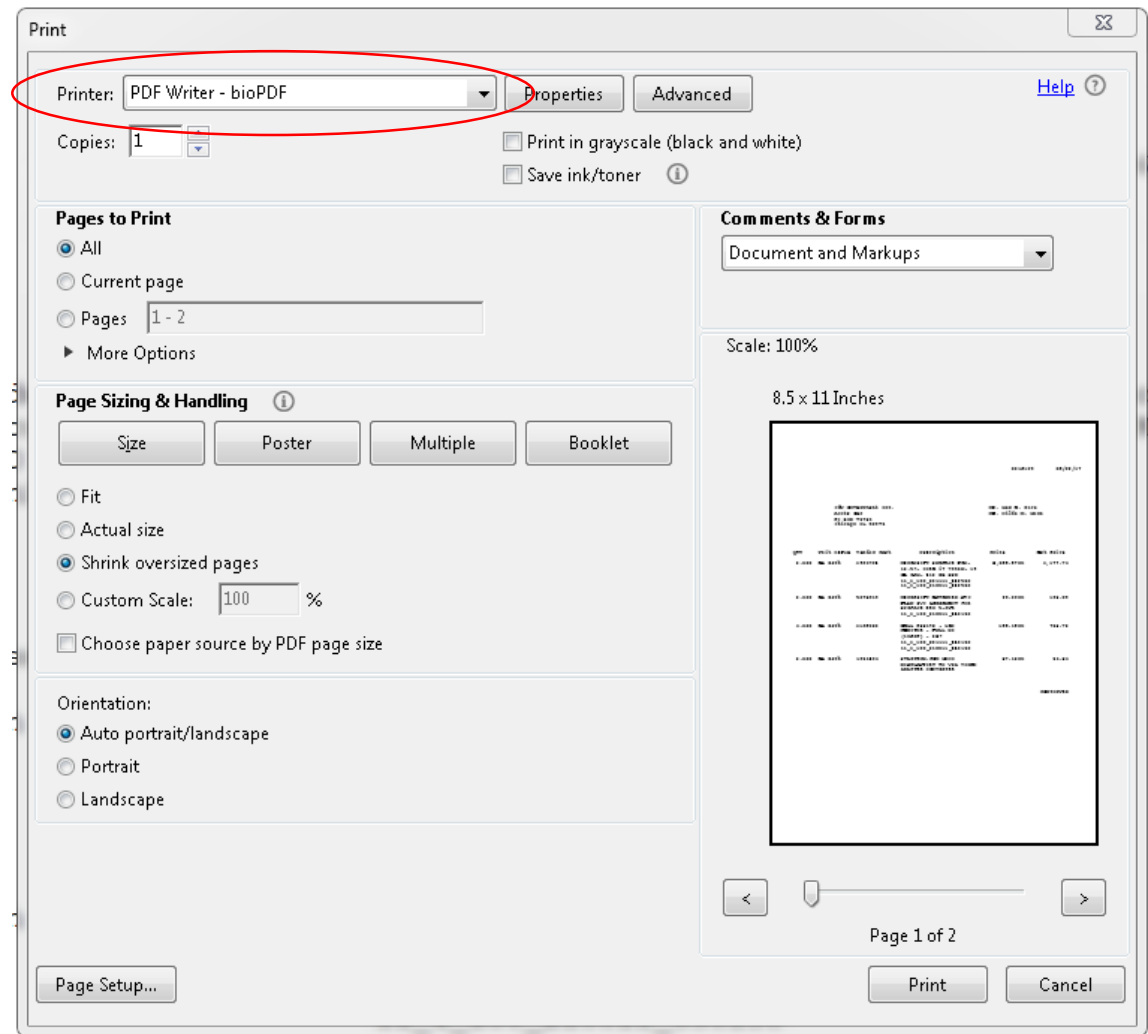
1. Click on: PRINT.

Shortcut Key: Ctrl + P

2. Print box will display

3. Choose PDF Writer/bioPDF

4. Click on: PRINT.



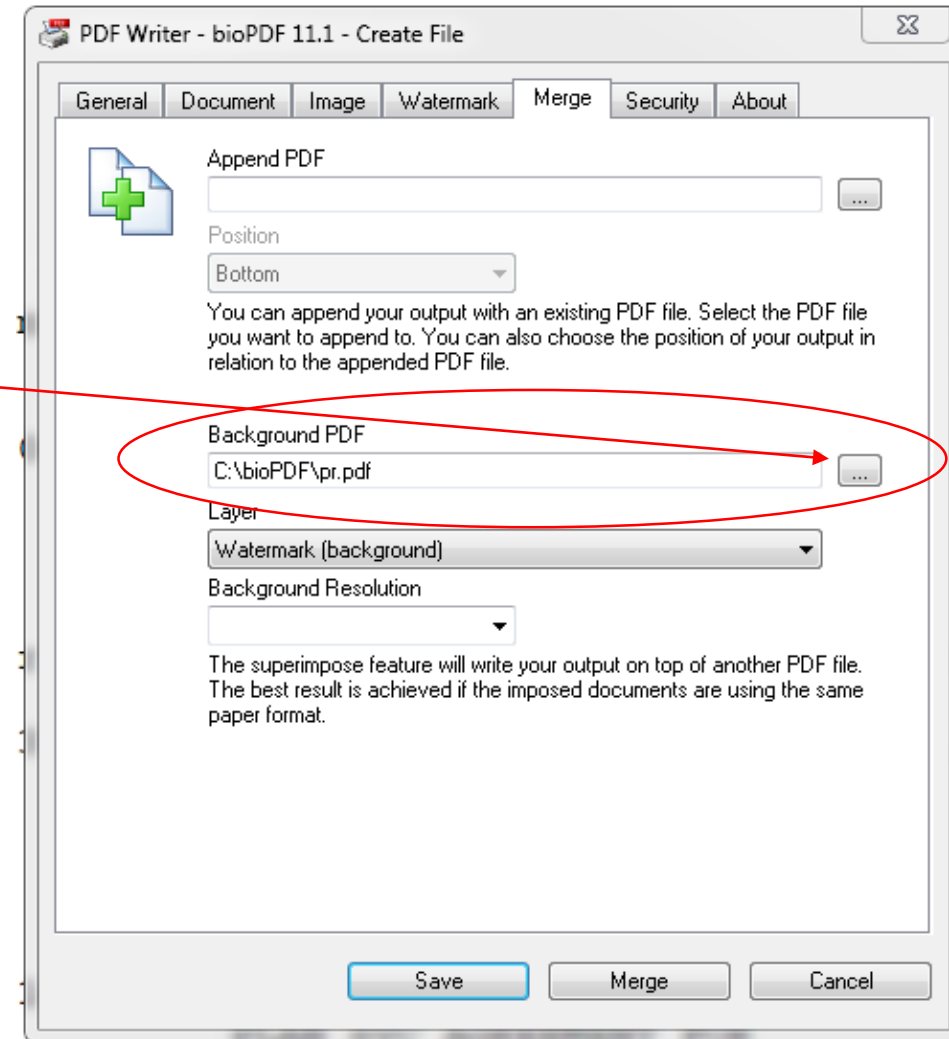


Next Screen ...Merge of PDF Browser to TSC PR template

1. Bullzip PDF Printer box will display
2. Click on: Merge Tab
3. Click on: Background PDF

NOTE: DO NOT use Append PDF.

1. Choose: TSC Purchase Requisition Template
2. NOTE: Please choose file accordingly to Total Cost and Purpose.
3. Click on: SAVE
4. Click on: PRINT












Purchase Requisition Templates

PR templates vary: Choose accordingly to Total cost.

1. Purchase Requisition should go accordingly to Total Cost.
 - Less than \$10k
 - More than \$10k
2. Grants Purchase Requisition and Grants Travel Requests require more signatures, therefore they have a separate Template.
 - Less than \$10k
 - More than \$10k

NOTE: BLANK Requisitions are intended for the first pages on requisitions of 2 pages or more.

Templates

-  Purchase Requisition of Purchases of LESS than \$10,000
-  Purchase Requisition of Purchases of MORE than \$10,000
-  Purchase Requisition (BLANK)
-  Grants Purchase Requisition of Purchases of LESS than \$10,000
-  Grants Purchase Requisition of Purchases of MORE than \$10,000
-  Grants Purchase Requisition (BLANK)
-  Grants Travel Requisition



Purchase Requisition (2 or more pages)



Purchase Requisition	REQ #	DATE
	0018106	08/09/17

Vendor: Cdw Government Inc.
Accts Rec
PO Box 75723
Chicago IL 60675

Initiator: Mr. Max E. Roca
Buyer: Ms. Nilda M. Mora

QTY	Unit Issue	Vendor Part	Description	Price	Ext Price
2.000	EA Each	4634735	MICROSOFT SURFACE PRO-12.3"- CORE I7 7660U- 16 GB RAM- 512 GB SSD 11_4_100_201111_559350 11_4_100_210011_559350	2,088.8700	4,177.74
2.000	EA Each	3072616	MICROSOFT EXTENDED SVC PLAN SVC AGREEMENT FOR SURFACE PRO 3-3YR 11_4_100_210011_550150	96.0300	192.06
4.000	EA Each	4138020	DELL P2217H - LED MONITOR - FULL HD (1080P) - 22" 11_4_100_201111_550150 11_4_100_210011_550150	188.1800	752.72
2.000	EA Each	1954534	STARTECH.COM MINI DISPLAYPORT TO VGA VIDEO ADAPTER CONVERTER	27.1200	54.24
CONTINUED					



Purchase Requisition	REQ #	DATE
	0018106	08/09/17

Vendor: Cdw Government Inc.
Accts Rec
PO Box 75723
Chicago IL 60675

Initiator: Mr. Max E. Roca
Buyer: Ms. Nilda M. Mora

QTY	Unit Issue	Vendor Part	Description	Price	Ext Price
			11_4_100_210011_550150 QUOTE# JDRN580		
TOTAL:					5,176.76

BID REQUIREMENTS TO BE SUBMITTED WITH REQUISITION (Select One)		PURPOSE OF PURCHASE:	
	Purchases of Less than \$2,000: No competitive quotes required.	I HEREBY CERTIFY THE ITEMS IN THIS REQUEST ARE NECESSARY FOR USE IN THIS DEPARTMENT.	
	Purchases from \$2,000 but Less than \$25,000: Three (3) quotes are required.		
1.		ACCOUNT SUPERVISOR	DATE
2.			
3.			
	Purchases of \$25,000 or More: Competitive bidding process required.	ACCOUNT MANAGER	DATE
	OTHER:		




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 appropriate signatures.

NOTE: Purchase requisitions are processed within 2-5 business days.

Purchase Requisition		REQ#	DATE
		0016895	03/03/17



Vendor: Ufland Enterprises
15 Chiapas Ct
Brownsville TX 78526

Initiator: Mr. Antonio L. Gueva
Buyer: Ms. Nilda M. Mora

QTY	Unit	Issue	Vendor Part	Description	Price	Ext Price
1.000	EA	Each		RENOVATION PROJECT AT OLD MORGUE 11_6_100_990003_554010	585.0000	585.00
TOTAL:						585.00

BIDDING REQUIREMENTS TO BE SUBMITTED WITH REQUISITION (Select One)		PURPOSE OF PURCHASE:
1.	Purchases of Less than \$2,000: No competitive quotes required.	I HEREBY CERTIFY THE ITEMS IN THIS REQUEST ARE NECESSARY FOR USE IN THIS DEPARTMENT.
2.	Purchases from \$2,000 but Less than \$25,000: Three (3) quotes are required.	
3.	Purchases of \$25,000 or More: Competitive bidding process required.	
OTHER:		ACCOUNT MANAGER OR DEAN / DIRECTOR / OTHER: _____ DATE: _____
		ACCOUNT MANAGER OR PRESIDENT: _____ DATE: _____

Purchasing * 801 Port Brown * Brownsville, Texas 78520
936-295-3423 * Fax 936-295-3400



Frequently Asked Questions (FAQs)

- Where do we send requests to close a Purchase Order?
 - A: All requests as regards to Purchase Orders or Requisitions should be submitted to the Purchasing Department by phone or email.
 - A: Please send all requests to Purchasing@tsc.edu or by calling (956) 295-3423.
- I forgot to write down my Requisition Number, how do I find it?
 - Go to Pneumonic: REQM
 - Enter 3 dots (...)
 - Press: Enter
 - Search for the Requisition you've entered
 - Write down the Requisition #



Frequently Asked Questions (FAQs) cont....

- Can the Requisition be processed without a signature?
 - No, all requisition should have proper signatures before arriving to the Purchasing Office.
- Can we substitute and item for another one?
 - Ex. You can substitute water for coke.
 - Ex. You can't substitute water for a camera.
- How do I look-up a vendor in Colleague?
 - Go to Pneumonic VEIN
 - Type in the Vendor Name
 - If the Vendor you are looking for does not appear, please send W9 and Vendor Application Form to Purchasing Department in person or by email.



Frequently Asked Questions (FAQs) cont....

- Who do we send Budget Amendments or Budget Transfer forms?
 - Please submit all documents regarding Budget to Business Services Department.
- Payment Vouchers, Receiving Reports, and Receipts.
 - These documents should be submitted to Accounts Payable.
- Can a Purchase Requisition be processed without a Sole Source Justification?
 - No, all appropriate documents should be attached to the requisition before arriving to the Purchasing Office.
 - We require that both the department and vendor fill out Sole Source Justification form.



For more information or questions concerning Purchase Order procedures please contact the Purchasing Department.

Please call (956) 295-3423 or email Purchasing@tsc.edu.



The End