



# 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

The screenshot shows the Ellucian Colleague UI interface for Requisition Maintenance (REQM). The browser address bar shows "REQM: Requisition Maintenance" and the page title is "REQM - Requisition Maintenance". The interface includes a search bar, navigation tabs (SEARCH RESULTS, NAVIGATION, FAVORITES), and a "Logout" button. The main form contains various input fields for requisition details, including Requisition Date, Initiator, Desired Date, Vendor ID, Name, Address, CTY/ST/ZP, Country, Currency, Ship To, and Ship Via. There are also fields for Approvals, Buyer, Expire Date, AP Type, and Invn Store. The form is currently displaying three pop-up windows:

- Pop-up 1 (Top):** "Requisition LookUp or (A)dd" with a text input field containing "A" and buttons for "OK", "Cancel", "Finish", and "Help".
- Pop-up 2 (Middle):** "Enter new Req No, 'N'o Number, <ENTER> to assign automatically" with a text input field and buttons for "OK", "Cancel", "Finish", and "Help".
- Pop-up 3 (Bottom):** "Number will be assigned automatically upon completion of Req" with an "OK" button.

Below the pop-ups, the form displays a date validation message: "04/01/17 falls in a future month. Accept Date? (Y,N)" with "Y" and "N" buttons. The bottom of the form includes fields for "Line Items", "Printed Comments", "Comments", "Priority", and "Requisition Done".



# 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: 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

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 | Types: 1 | Name: 1 Anderson's | Address: 1 P O Box 1151 | CTY/ST/ZP: Minneapolis MN 55440 | Country: | Currency: | Terms: | Ship To: CR Tsc Central Recei | FOB: | Ship Via: | Commodity: |

Approvals: 1 | Buyer: Ms. Nilda M. Mora | Line Items: 4 | Printed Comments: 1 | Comments: 1 | AP Type: A REGULAR ACCOUNTS PAYABL | Priority: | Invn Store: | Requisition Done: No



# 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.
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

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 : Status Date :

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

Comments 1

Controller Description New Record Value 1/2

Commodity Codes LookUp

GL Account 11\_1\_100\_133151\_551160 does not exist

OK

The GL account 11-4-100-420011-550130 is inactive.

OK



# (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.

The screenshot shows the Ellucian Colleague UI interface for the RQIL - Requisition Item List. The top navigation bar includes 'REQM: Requisition Maintenance', 'Search', 'SEARCH RESULTS', 'NAVIGATION', 'FAVORITES', and 'Logout'. The main header displays 'Ellucian Colleague UI Live Environment' and 'No Active Context'. The menu bar contains 'File', 'Options', 'Help', 'Auto-Close Context', 'Save', 'Save All', 'Cancel', and 'Cancel All'. The main content area shows 'REQM - Requisition Maintenance' and 'RQIL - Requisition Item List' tabs. Below the tabs, there are fields for 'Requisition:', 'Status:', 'Status Date:', and 'Vendor: Mr. Alberto Vasquez'. The main table lists line items with columns for Description, Quantity, Estimated Price, Extended Price, and Tax. The first two items are 'TRAVEL EXPENSE ATTEND' and 'MILEAGE'. A summary table at the bottom shows 'Item Total' (62.53), 'Tax Total' (0.00), and 'Req Total' (62.53). The footer contains 'Controller Description' and 'Value 2/2'.

	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					

  

Taxes	Amounts	Item Total
1		62.53
2		0.00
		Req Total 62.53



# 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.

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 Types 1  
Name 1 Anderson's  
Address 1 P O Box 1151  
CTY/ST/ZP Minneapolis  
Country  
Currency  
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  
Requisition Done No

This Requisition has been assigned a Number of 0017079  
OK





# RQSP (To print PR)

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

The screenshot shows the Ellucian Colleague UI interface for RQSP (Requisition Single Print). The browser title is "RQSP: Requisition Single Print". The interface includes a search bar, navigation tabs (SEARCH RESULTS, NAVIGATION, FAVORITES), and a "Logout" button. The main content area displays the "RQSP - Requisition Single Print" form. The form includes fields for "Requisition:", "Status:", and "Status Date:". Below these are fields for "Initiator", "Vendor Name" (with a list of 1, 2, 3), and "Printed Comments". To the right, there are date fields for "Req. Date", "Desired Date", and "Expire Date". A "Requisitions LookUp" dialog box is open, showing a search input field with the value "17079" and buttons for "OK", "Cancel", "Finish", and "Help". At the bottom, there is a table with columns "Description", "Quantity", "Unit Price", and "Extended Price", and a "Requisition Amt" field.

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 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

Peripheral : SETPTR.RQSP.8008 Description : Requisition Print  
Process : RQSP Description : Requisition Single Print

Output Device P Printer Spooler  
Printer  
Form Name  
Banner  
Security  
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



# REPORT BROWSER WINDOW

(To print in PDF Format via BullZip printer)

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

The screenshot shows a 'Report Browser' window with a toolbar containing 'Save As', 'Export PDF', and 'Print Remote' buttons. The main content area displays an invoice for 'Ward's Natural Science Est. L1' with two line items: a binocular (35.000 EA Each, 667.5000 Price, 23,362.50 Ext Price) and an HP stirrer (1.000 EA Each, 363.2000 Price, 363.20 Ext Price). An 'Export to PDF' dialog box is open in the foreground, showing 'Formatting Options' with 'Courier' font, '10.0' font size, 'Portrait' orientation, and 'Letter' paper size. The 'Create PDF' button is highlighted.

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 32.1.100.829355.559340	363.2000	363.20



# 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

The screenshot shows a 'Report Browser' window with a table of items and a 'Bullzip PDF Printer 11.0 - Create File' dialog box open over it. The dialog box is on the 'Merge' tab, showing options for 'Append PDF', 'Background PDF', and 'Layer'.

Report Browser

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	667.5000	23,362.50
1.000	EA	Each		32_1_100_829355_559340		

Bullzip PDF Printer 11.0 - Create File

General Document Image Watermark Merge Security About

Append PDF

Position  
Bottom

You can append your output with an existing PDF file. Select the PDF file you want to append to. You can also choose the position of your output in relation to the appended PDF file.

Background PDF  
C:\Users\nilda.mora\Documents\BulZip\po.pdf

Layer  
Watermark (background)

Background Resolution

The superimpose feature will write your output on top of another PDF file. The best result is achieved if the imposed documents are using the same paper format.

Save Merge Cancel



# 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.



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_990002_554010	585.0000	585.00
<b>TOTAL:</b>						<b>585.00</b>

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.			
2.			
3.	Purchases of \$25,000 or More: Competitive bidding process required	ACCOUNT MANAGER OR PRESIDENT	DATE
OTHER:			



The End