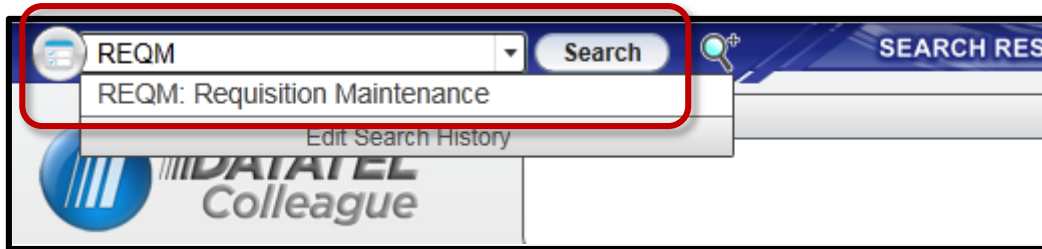


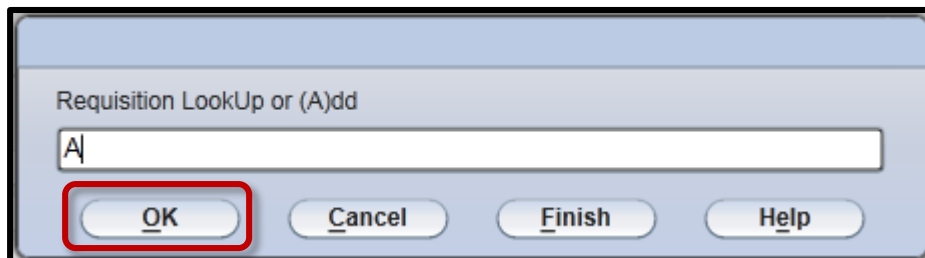
Colleague WebUI – Blanket Order ITS

1. Log into Colleague. Type **REQM** into the Form Search and press **Enter** or click the **Search** button.



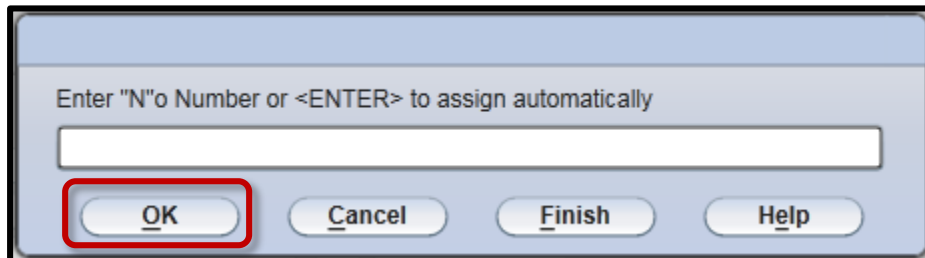
REQM Search SEARCH RES
REQM: Requisition Maintenance
Edit Search History
DATA TEL Colleague

2. At the Requisition Lookup, type **A** (to add) and press **Enter** or click the **OK** button.



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

3. At the Enter “N” prompt, do not enter anything. Press **Enter** or click the **OK** button.



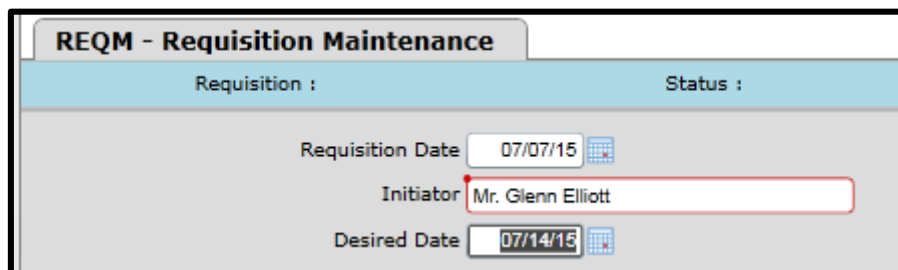
Enter "N"o Number or <ENTER> to assign automatically
OK Cancel Finish Help

4. Click the **OK** button to proceed.



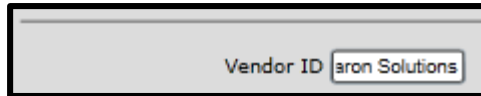
Number will be assigned automatically upon completion of Req
OK

5. Go to the **Initiator** field and enter your Bucks employee ID number and press **Enter**. Choose the **Desired Date** (one week from today's date is sufficient).



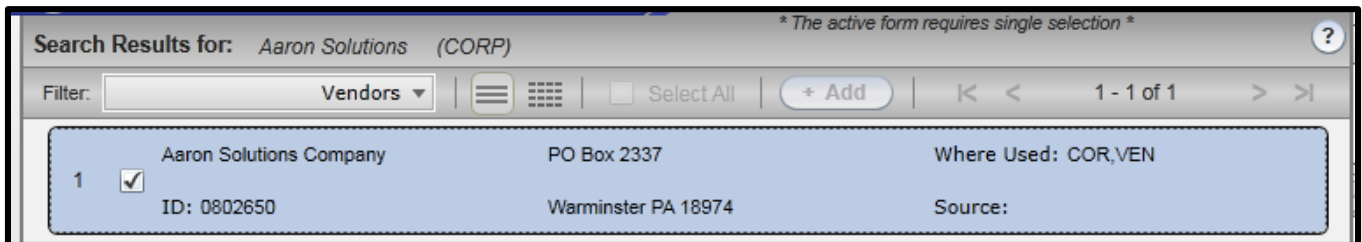
REQM - Requisition Maintenance
Requisition : Status :
Requisition Date 07/07/15
Initiator Mr. Glenn Elliott
Desired Date 07/14/15

6. Type in the **Vendor ID** such as Aaron Solutions and press **Enter**.



A screenshot of a search input field. The text "Vendor ID" is on the left, and "aron Solutions" is entered in the input box. The entire field is enclosed in a black rectangular border.

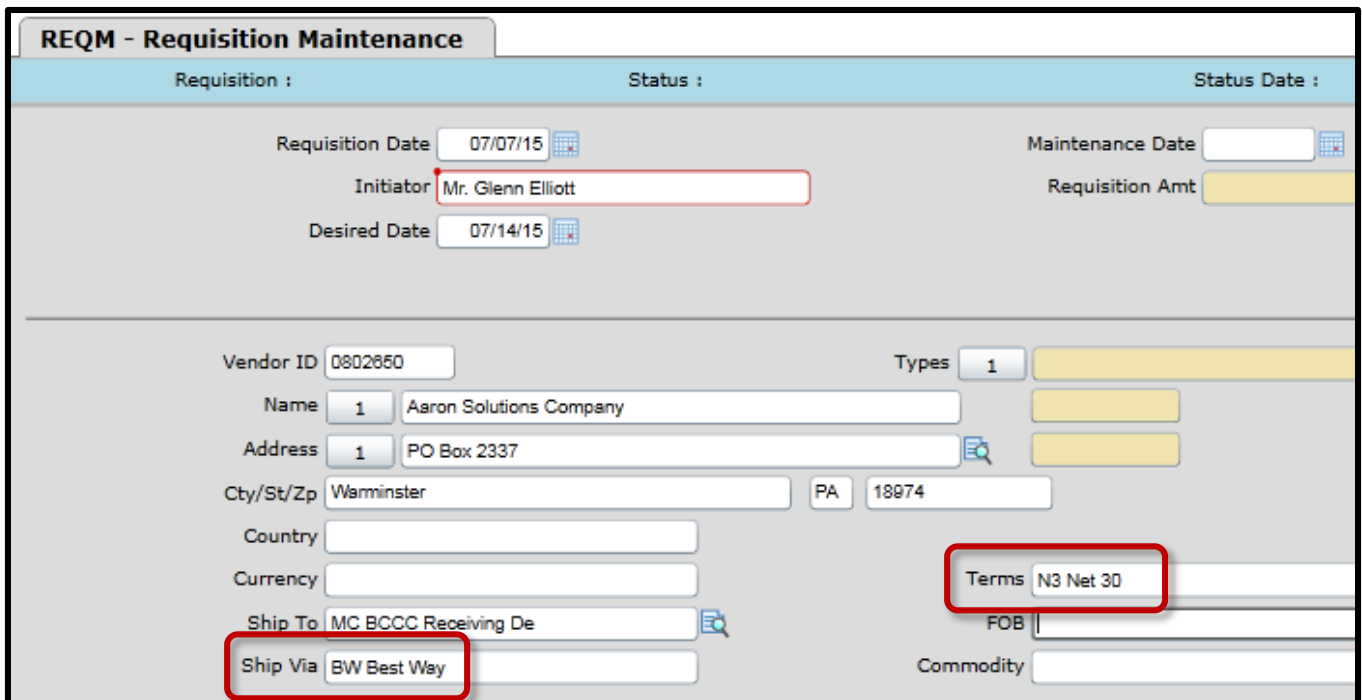
7. Search results for your Vendor ID will appear on the following screen. Double click on the appropriate entry or place a checkmark in the entry and click the **Open** button at the bottom.



A screenshot of a search results interface. At the top, it says "Search Results for: Aaron Solutions (CORP)". Below that, there's a filter dropdown set to "Vendors" and a "Select All" checkbox. A table of results is shown with one entry: "1" with a checkmark, "Aaron Solutions Company", "PO Box 2337", "Where Used: COR, VEN", "ID: 0802650", "Warminster PA 18974", and "Source:". The entry is highlighted in blue.

8. The information for Aaron Solutions will populate in the **Name** and **Address** fields. The **Ship To** field will populate with "MC BCCC Receiving De"

- Type **BW** for Best Way in the **Ship Via** field and press **Enter**.
- Type **N3** for Net 30 in the **Terms** field.
- You will not need to type in any additional information on this section of the form.



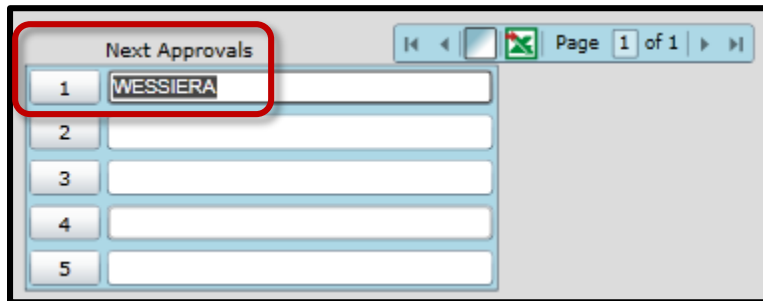
A screenshot of the "REQM - Requisition Maintenance" form. The form has several fields: "Requisition Date" (07/07/15), "Initiator" (Mr. Glenn Elliott), "Desired Date" (07/14/15), "Maintenance Date", "Requisition Amt", "Vendor ID" (0802650), "Types" (1), "Name" (Aaron Solutions Company), "Address" (PO Box 2337), "City/St/Zp" (Warminster, PA, 18974), "Country", "Currency", "Terms" (N3 Net 30), "Ship To" (MC BCCC Receiving De), "Ship Via" (BW Best Way), "FOB", and "Commodity". The "Terms" and "Ship Via" fields are highlighted with red boxes.

9. Go to the **Approvals** field and enter your Bucks username: **mckeownt** and press **Enter**. You will be prompted to enter your approval password. *Note:* this password can be the same as your Bucks password. If you do not have an approval password, you will need to create one using the **APPW** form in Colleague.



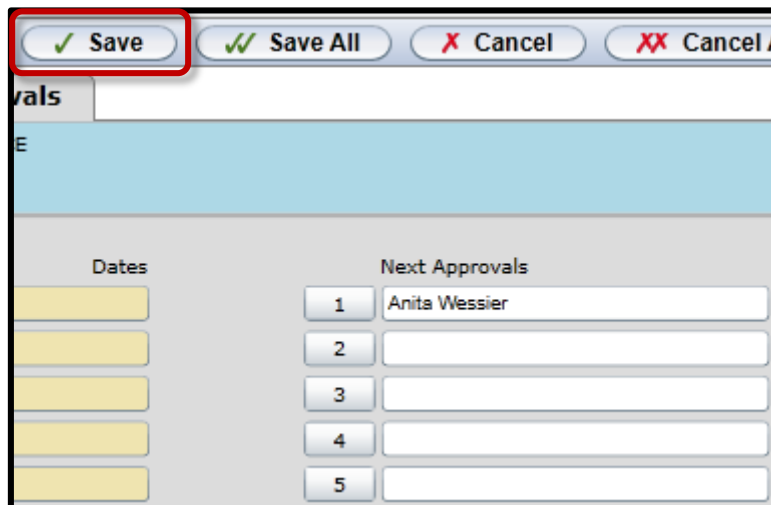
The screenshot shows a form with several fields: Approvals (value: 1, username: mckeownt), Buyer, Expire Date, AP Type, and Invn Store. A modal dialog box titled "Enter Password" is overlaid on the right, with an empty text input field and "OK" and "Cancel" buttons.

10. Under **Next Approvals**, enter **wessiera** (username for Anita Wessier, Budget Officer) and press **Enter**.



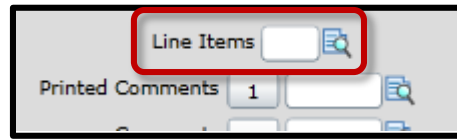
The screenshot shows a table with 5 rows and 2 columns. The first row is highlighted with a red box and contains the number "1" in the first column and the username "WESSIERA" in the second column. The other rows are empty. A "Page 1 of 1" indicator is visible at the top right.

11. Anita's name will populate into the Next Approvals field. Click **Save**.

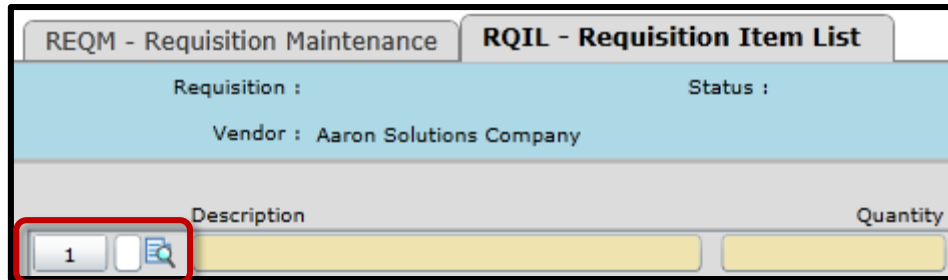


The screenshot shows a form with a "Save" button highlighted by a red box. Below the button, the "Next Approvals" field is populated with "Anita Wessier" in the first row. The "Dates" field is empty. The "Next Approvals" field has 5 rows, with the first row containing "Anita Wessier" and the others empty.

12. You will be returned to the main requisition screen. Go to the **Line Items** field in the bottom right and click the magnifying glass.

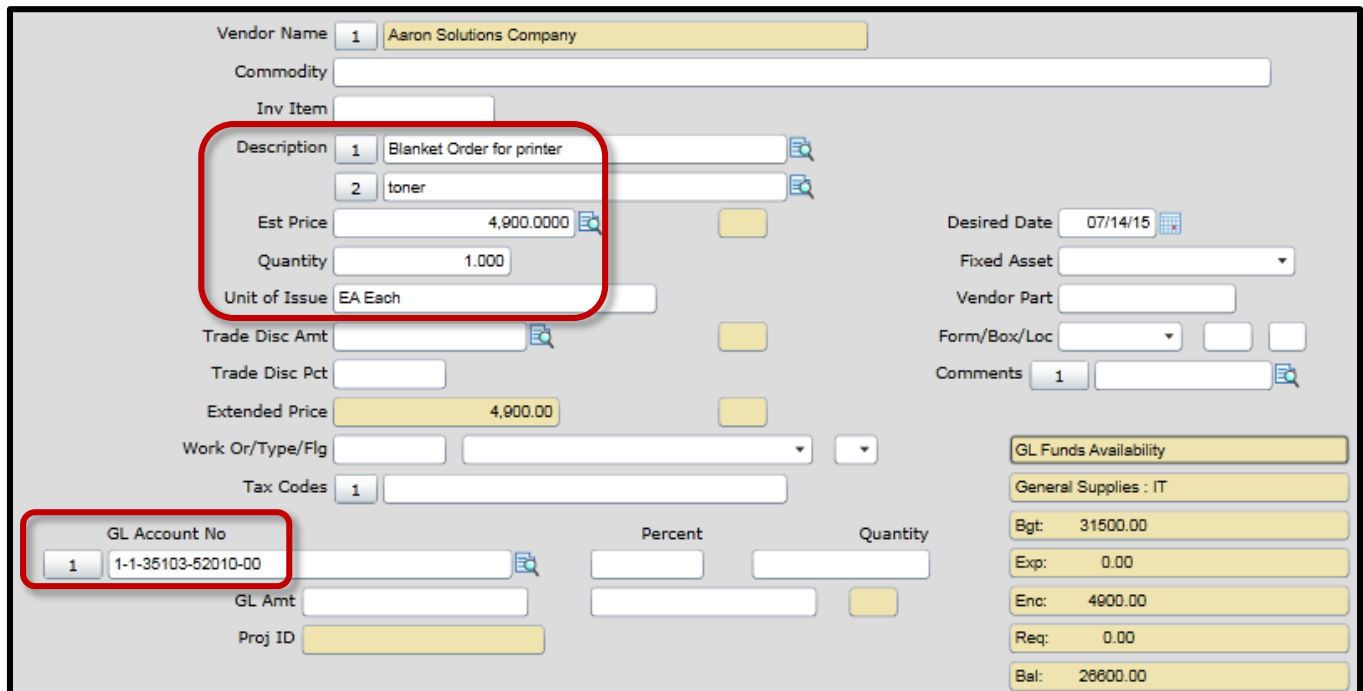


13. The **RQIL** form will now open. Click the magnifying glass next to **line 1**.



14. The **RQIM** (Requisition Item Maintenance) form will now open.

- Go to the **Description** for line 1 and type **“Blanket Order for printer toner”** or any other description if another vendor. You must state **Blanket Order** so the Purchasing Department knows that this order cannot be entered into SciQuest. You will need to finish typing the rest of the description on line 2.
- Go to **Est Price** and enter **\$4900** and press **Enter**. (This value cannot exceed \$5000).
- Go to **Quantity** and type **1** and press **Enter**.
- Go to **Unit of Issue** and type **EA** and press **Enter**.
- Go to **GL Account No** and enter the following account string: 11351035201000 (or whatever budget account number you wish to use) and press **Enter**.
- You will notice the GL Funds Availability will populate and show your current balance.



Vendor Name 1 Aaron Solutions Company

Commodity

Inv Item

Description 1 Blanket Order for printer

2 toner

Est Price 4,900.0000

Quantity 1.000

Unit of Issue EA Each

Trade Disc Amt

Trade Disc Pct

Extended Price 4,900.00

Work Or/Type/Flg

Tax Codes 1

GL Account No 1 1-1-35103-52010-00

Percent

Quantity

GL Amt

Proj ID

Desired Date 07/14/15

Fixed Asset

Vendor Part

Form/Box/Loc

Comments 1

GL Funds Availability

General Supplies : IT

Bgt: 31500.00

Exp: 0.00

Enc: 4900.00

Req: 0.00

Bal: 26600.00

15. Once the RQIM form has been completed, click the **Save** button.

The screenshot shows the 'RQIM - Requisition Item Maintenance' window. The menu bar includes 'File', 'Options', and 'Help'. Below the menu bar are buttons for 'Keep Context Open', 'Save', 'Save All', 'Cancel', and 'Cancel All'. The 'Save' button is highlighted with a red box. The form contains fields for 'Requisition :', 'Status :', and 'Status Date :'. Below these is a 'Vendor Name' field with the value '1 Aaron Solutions Company'.

16. You will return to the RQIM screen. Colleague assumes you have another item to submit. For blanket orders, you will only have one item. Click **Cancel**. This does not cancel your order. It simply takes you out of the RQIM screen and returns to the RQIL screen for final review.

The screenshot shows the 'RQIM - Requisition Item Maintenance' window. The menu bar includes 'File', 'Options', and 'Help'. Below the menu bar are buttons for 'Keep Context Open', 'Save', 'Save All', 'Cancel', and 'Cancel All'. The 'Cancel' button is highlighted with a red box. The form contains fields for 'Requisition :', 'Status :', and 'Status Date :'. Below these is a 'Vendor Name' field with the value '1 Aaron Solutions Company' and a 'Commodity' field.

17. You will return to the RQIL screen. Click **Save**.

The screenshot shows the 'RQIL - Requisition Item List' window. The menu bar includes 'File', 'Options', and 'Help'. Below the menu bar are buttons for 'Keep Context Open', 'Save', 'Save All', and 'Cancel'. The 'Save' button is highlighted with a red box. The form contains fields for 'Requisition :', 'Status :', and 'Vendor : Aaron Solutions Company'. Below these is a table with columns for 'Description', 'Quantity', and 'Estimated Price'. The table has one row with the following data:

Description	Quantity	Estimated Price
1 Blanket Order for printer	1.000	4,900.0000

18. You will return to the REQM screen. In the bottom right corner of the form, change the N in **Requisition Done** to **Y** and press **Enter**.

The screenshot shows the bottom right corner of the REQM screen. It contains fields for 'Line Items', 'Printed Comments', 'Comments', 'Priority', and 'Requisition Done'. The 'Requisition Done' field is highlighted with a red box and contains the value 'Y'.

You're done! Colleague will prompt you about approvals. Press Enter again and Colleague will display the requisition number. You may print a copy of this for your records but is not necessary. A hard copy of the blanket order will be mailed to you from the Purchasing Department.