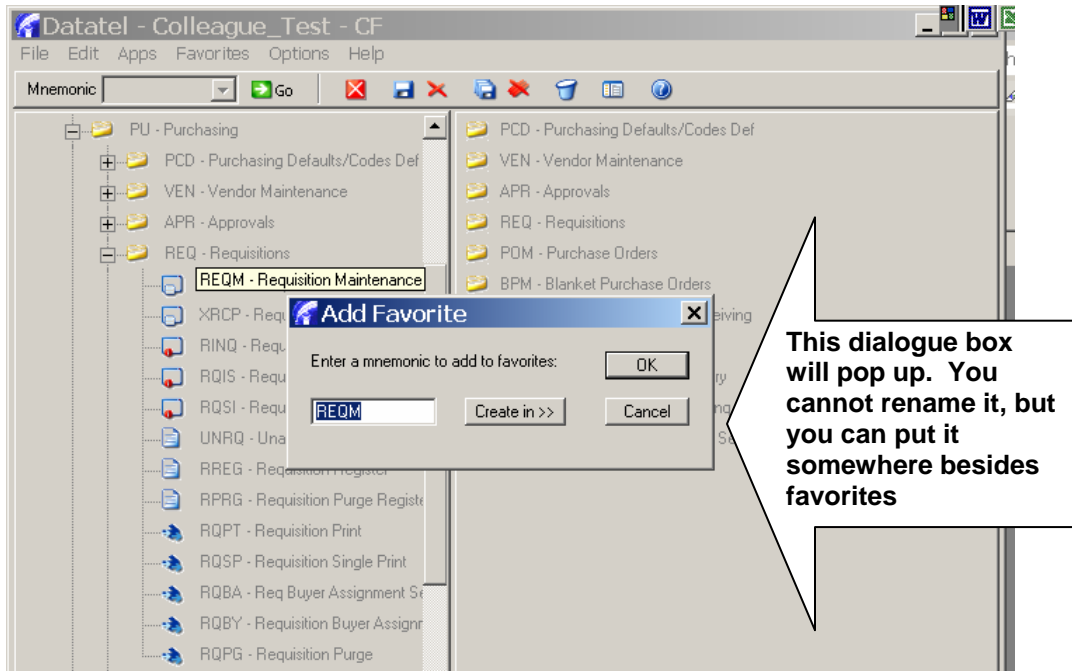
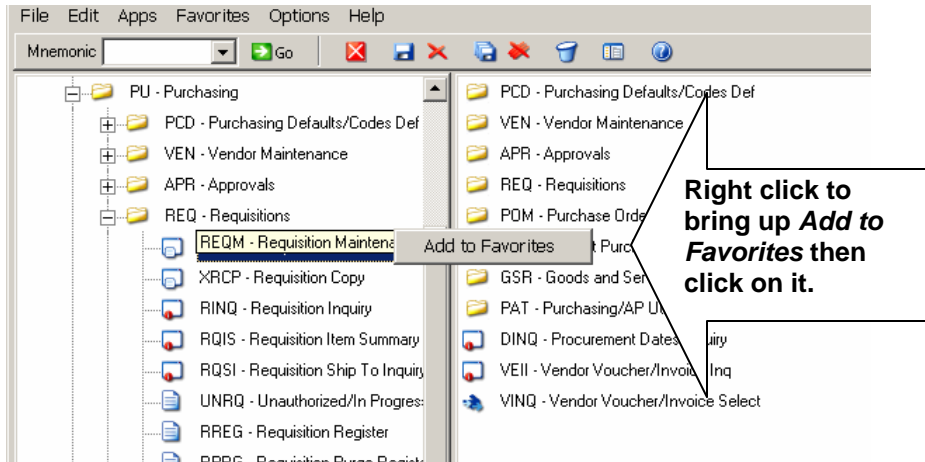


Special Features

Shortcuts – Creating Favorites

Colleague allows you to create your own menu with the *Mnemonics* that you use frequently. The process is quick and simple, and you can rename them if you wish.

1. *Right click* on the mnemonic you want to add to your favorites

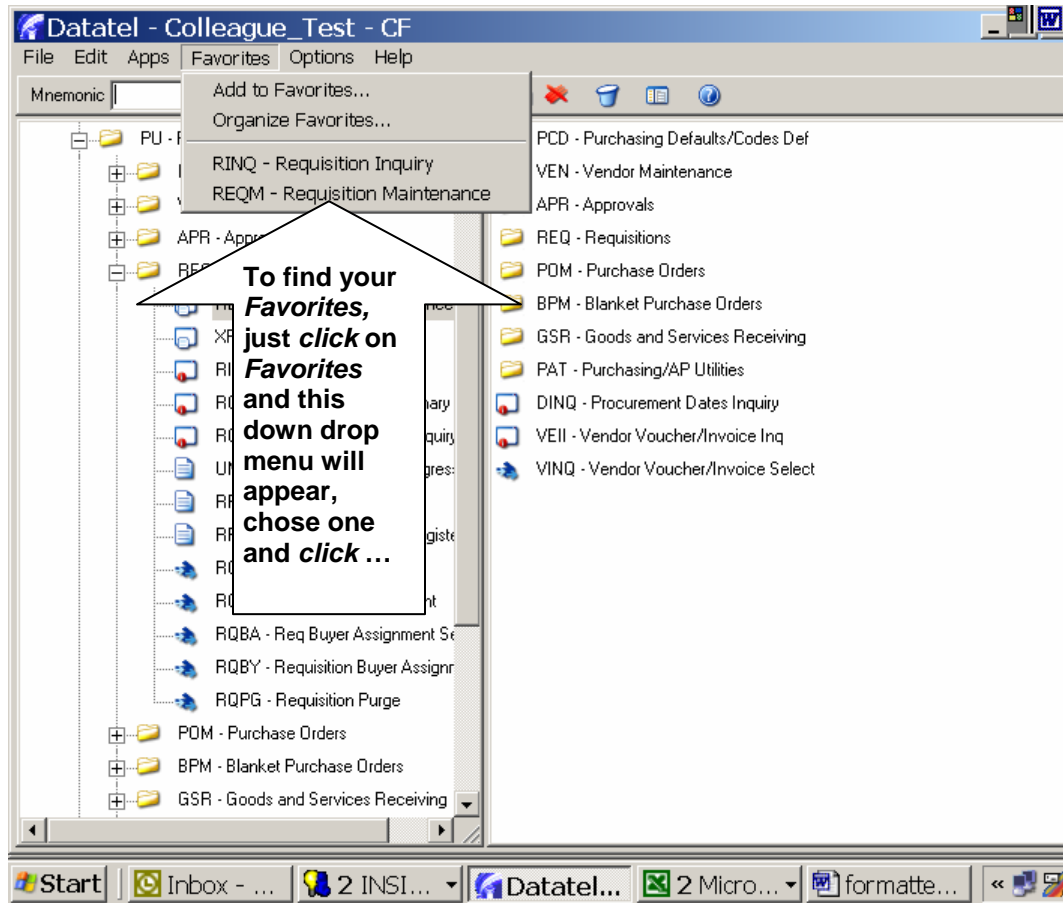


You can put this in *Favorites*, or you can create another folder under *Favorites*. If you use certain screens on a daily basis, you might want to separate those from the ones you only use monthly. In most cases, you will just let this default to *Favorites*.

Click OK and it's done.....

Special Features

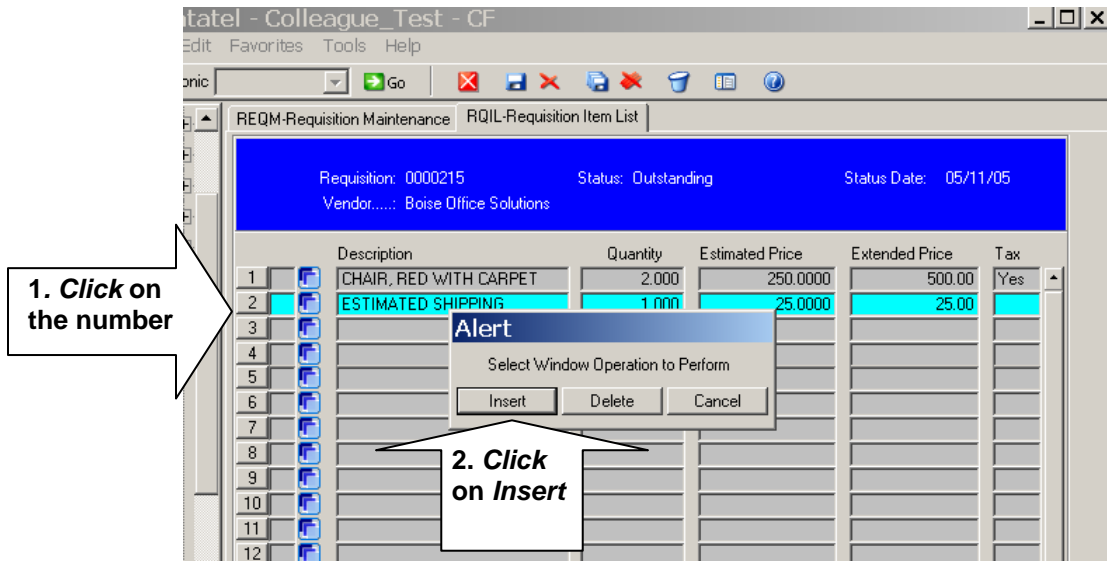
Shortcuts – Creating Favorites



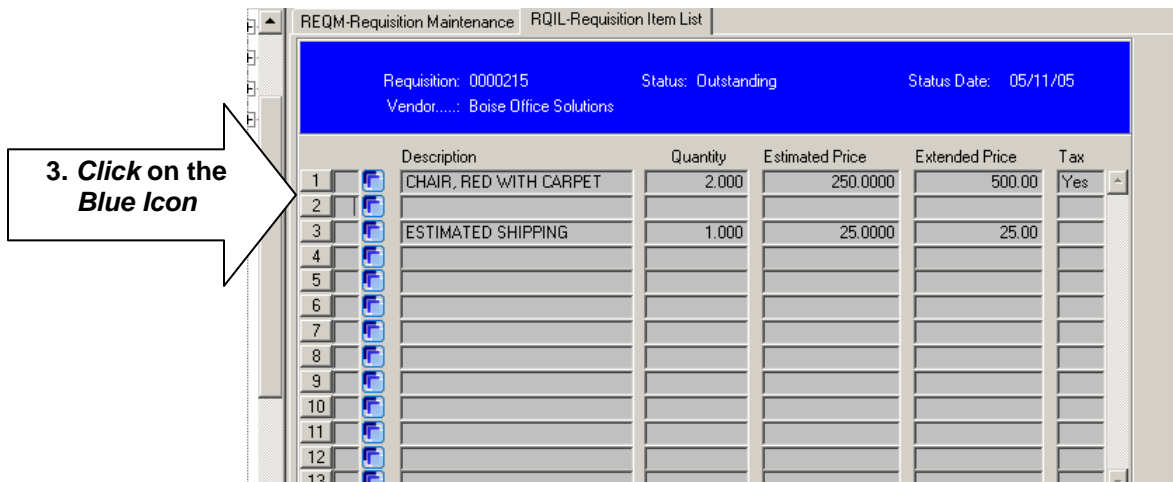
Inserting Item line on requisition

Sometimes you need to insert a whole line item on a requisition. Your shipping or installation line should always be last. If you discover that you need to add another item;

1. Go to the *Requisition Item List*, Choose the item that you want to move down – or insert a blank line item above, and click on the number – which will bring up a *Dialog Box*
2. Click on *Insert*



3. Click on the *blue icon* on the blank line to go back to the *Item* screen and enter the information for the added item.



Manually overriding tax amount

On most purchases, the tax rate is the standard 7.75%. Or for certain items – magazine subscriptions, professional services, or maintenance agreements there is no tax. However there are a few instances where the tax amount does not easily fit into either category. This is usually when you are purchasing an item and trying to group taxable items and non-taxable services into one line item (i.e. Purchase of equipment with a maintenance agreement), or where you must pay the tax amount of the retail price, but have a discount that reduces the actual cost (i.e. Cell Phones). In these cases you will override the tax rate and enter the exact tax of the line item.

- 1: Enter the standard sales tax code (SS):
- 2: Click on the **Blue Icon** next to the *GL Account No.* field,

The screenshot displays the 'REQM-Requisition Maintenance' window. The requisition number is 0000215, with a status of 'Outstanding' and a status date of 05/11/05. The vendor is 'Boise Office Solutions' and the commodity is '615'. The description includes 'CHAIR, RED WITH CARPET' and 'CASTERS, #245-42-234'. The estimated price is 250.0000 and the quantity is 2.000. The extended price is 500.00. The tax code is 'SS Sales Tax - 7.75%'. The GL Account No. is '11-1010-74300-677000-6001' with a percent of 16. The GL Amt is 500.00. Two callout boxes provide instructions: '1. Enter standard tax rate' points to the Tax Codes field, and '2. Click on Blue Icon' points to the blue icon next to the GL Account No. field.

Manually overriding tax amount

This will take you down to *Req GL Line Item Tax Maint* screen where you can ...

3. Manually change the tax amount. This should be the total tax for this line item. If you have a quantity greater than one each, be sure the tax amount covers the entire amount (i.e. tax for one is \$15, so the amount entered would be 2 X \$15 = \$30)

Requisition: 0000215 Date: 05/11/05 Status: Outstanding
Vendor..... Boise Office Solutions

Tax Distribution for GL Account No 11-1010-74300-677000-6001
Project associated with this GL []
System Calculated No

Item	GL No	Tax Code	Tax Code	Tax Amount	Foreign Tax Amount	Tax Type
1	11-1010-74300-677000-6001	SS		30.00		
2						
3						

Tax Project ID [] [] []
Tax Project ID [] [] []
Tax Project ID [] [] []

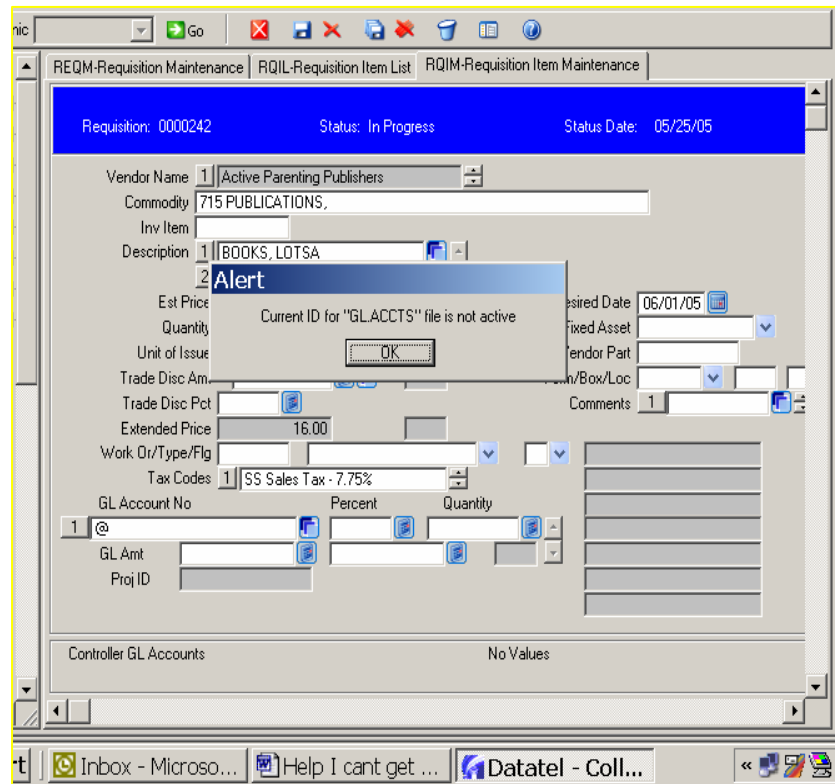
ITC/Refund Amount []
Rebate Amount []

Tax Total 30.00 0.00

Element GL Account No Value 1/1

SAVE and **UPDATE** and continue on with your requisition.

It won't let me use my Budget Number!



This one means that someone else is also trying to create a requisition with the same budget number. You may encounter this one at year end when everybody is doing requisitions.

HELP!! I can't get out

Because Datatel Colleague is a real-time system, it will not allow access to the same records at the same time. So sometimes you will get stuck or will not be allowed to access a record.

The screenshot shows a web browser window titled "Datatel - Colleague_Test - CF". The browser's address bar shows a URL starting with "c". The main content area is titled "REQM-Requisition Maintenance". At the top, a blue header bar displays "Requisition: 0000215", "Status: Outstanding", and "Status Date: 05/11/05". Below this, the form contains several fields: "Requisition Date" (05/11/05), "Maintenance Date" (05/11/05), "Initiator" (Kathleen Downs), and "Requisition Amt" (555.00). A "Desired Date" field is also present. The "Vendor ID" is 003429. An "Alert" dialog box is overlaid on the form, displaying the message "VENDORS - 0034297 locked by user 208" and a "Retry" button. The form also includes fields for "Name", "Address", "City/ST/Zp" (San Die), "Country", "Currency", "Ship To" (DC SDCCD Distributio), "Ship Via", "Terms" (N3 Net 30), "FOB", "Commodity" (615 Office Supplies: Gen), "Approvals" (1), "Buyer" (Vanessa White), "Printed Comments" (1), "Comments" (1), "AP Type" (AP Accounts Payable), "Invn Store", "Line Items" (2), "Priority" (RT RUSH), and "Requisition Done" (Yes).

This one means that someone in Purchasing or Accounts Payable is updating information on the vendor you are using. Wait a moment, we will be out shortly. **Click Retry**. If after 5 minutes, you are still stuck, call the District's Help Desk, they will be able to identify who's in the record (in case they forgot and went to lunch). If all else fails, try a warm boot – *Control Alt Delete*.