This document provides guidance for creating a requisition for purchasing goods and services within the guidelines and policies set by the department of Business & Finance within the confines of the Ellucian (Datatel) Colleague Finance module at Oklahoma City Community College.

How to Create a Requisition

Purchasing

Professional Development
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1. Access the REQM – Requisition Maintenance screen (form):
   a. Click the Person/Form button to display “Form”
   b. Type the neumonic REQM in the Form Search field.
   c. Click the Search button
Or
   a. Click the /NAVIGATION/ button.
   b. Select “CF” from the Navigation Application dropdown.

2. When the REQM - Requisition Maintenance form opens, you will be prompted for a requisition number or given the option to (A)dd a requisition by typing “A”.
3. If (A)dd, then,
   a. Type “N” for No Number
4. Click OK

or

4. Key Enter to assign automatically

5. Click OK when message “Number will be assigned automatically upon completion of Req” pops up.
6. If you know the requisition number, type the number in the Requisition LookUp field, and then press OK.

OR

6. If you don’t know the requisition number, then:

1. Click the Initiator field and type:
   a. “…” to see a complete list of requisitions, or
   b. “;” in Initiator" field, or
   c. “;” in Initiator’s ID#” in the Requisition LookUp or (A)dd field.

2. Click OK
Steps in creating a requisition:

1. **Requisition Date** will automatically default to current date.
2. Type your user ID or your name in the **Initiator** field.
3. Type vendor **Name**;
   a. If it is a vendor that the College currently uses and exists in Datatel, then the vendor information will automatically populate.
   b. If it is a new vendor, nothing will populate and the following information will need to be obtained:
      - Vendor name,
      - Address,
      - Phone number,
      - Fax number,
      - FEI#,
      - Contact person,
      - Email.
4. Detail (by clicking ) to the right of the **Approvals** field to open the **APRV - Approvals** screen.
5. Always enter the budget officer’s User Name or User ID in the Next approval column

Required approvals:
- Anything with OCCC logo—Paula Gower (Printing-504130)
- Computer equipment—David Anderson (503110/513110, $500.00+, monitors, iPads, etc.)
- iPhones are 503100, fixed asset, does not require David’s approval
- Software, boxed version, downloadable, upgrades and licenses—Lisa Davis (505145/515145, 504101/514101)

6. **Save** or **Cancel**, after each step

Approvers must type in the User ID# and then approval password

7. **Press OK.**
Enter line items

8. Detail into the first line item of the Description field, this will open RQIM - Requisition Item Maintenance.

9. Enter a description of the item, item #, all pertinent information needed to process the order.
   For more space, detail into Description.

10. Enter the estimated price (Est Price) per unit of issue (each, box, package, etc.)

11. Enter the Quantity of units

12. Enter the correct Unit of Issue (each, box, package, etc.)
13. Enter department account number. To pull up department object codes enter “...five digit department number...” (e.g. ...62150...). This will bring up a resolution screen with the account number for your department.

14. Type in the appropriate "seq" number (not the GL account Number) and presenter on the keyboard. This will return you to the RQIM screen.

15. Enter the percentage that should be charged to the account number.

The box to the lower right corner will show the status and available funds in the object pool.

16. **Save**, automatically opens RQIM – Requisition Item Maintenance

17. **Cancel** to return to the RQIL - Requisition Item List screen.

18. If you have another item to enter, return to step 8 and detail into the next line and complete the RQIM screen for that item and follow steps as demonstrated above.

19. When finished, **Save All** to return to the REQM – Requisition Maintenance screen.
20. Detail into the Comments field to enter information that needs to be communicated to Purchasing.

**Printed Comments** are for account numbers and miscellaneous comments for the vendor which will be printed on the PO.

21. When finished, change the **Requisition Done** field to **YES**

22. **Save All.**

A requisition number has been assigned.

**Check Requisition Status:**

1. Select **RINQ-Requisition Inquiry** from the **Requisitions – REQ** dropdown.

2. Detail into **BPO/PO** to view status.