

San Jose/Evergreen Community College District How to Approve Requisitions in Datatel

As a budget manager, you will need to approve requisition requests using Datatel. By logging into the approval queue you will be able to view outstanding requests waiting for approval. You will also be able to view details about the requisition including requestor, amount, and account numbers.

APRN – Approvals Needed

1. Login to Datatel. Enter your username and password provided to you by ITSS. Then select OK to continue.



Datatel Login

Enter a User ID, Password and Environment:

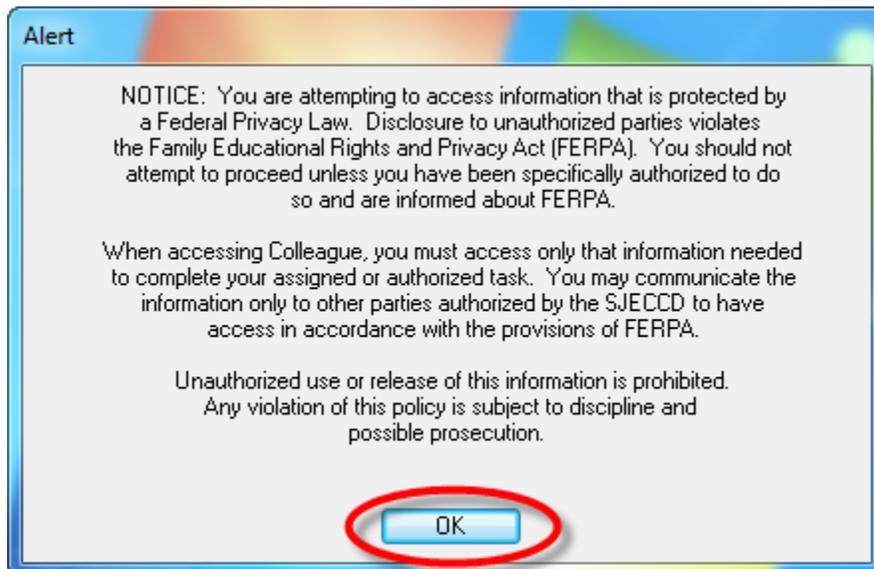
User ID: sawan

Password:

Environment: R18Prod

OK Cancel

2. A FERPA privacy notice will appear. Select OK to open Datatel.



Alert

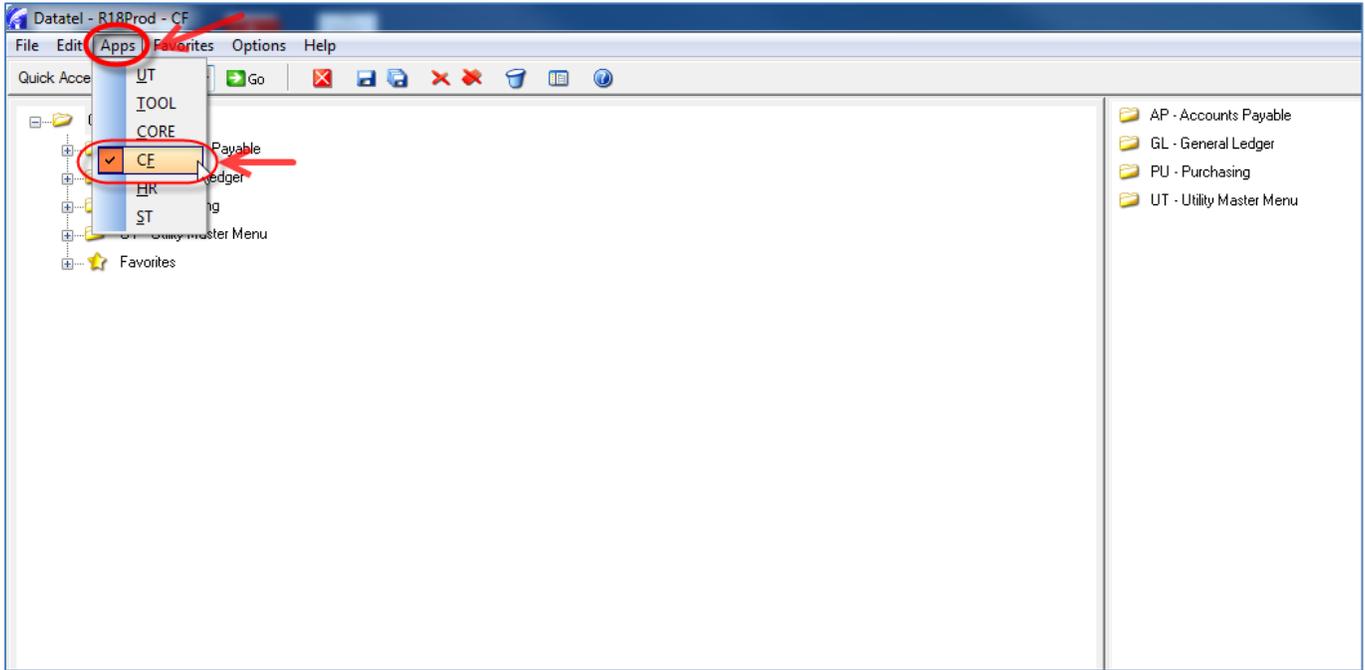
NOTICE: You are attempting to access information that is protected by a Federal Privacy Law. Disclosure to unauthorized parties violates the Family Educational Rights and Privacy Act (FERPA). You should not attempt to proceed unless you have been specifically authorized to do so and are informed about FERPA.

When accessing Colleague, you must access only that information needed to complete your assigned or authorized task. You may communicate the information only to other parties authorized by the SJECCD to have access in accordance with the provisions of FERPA.

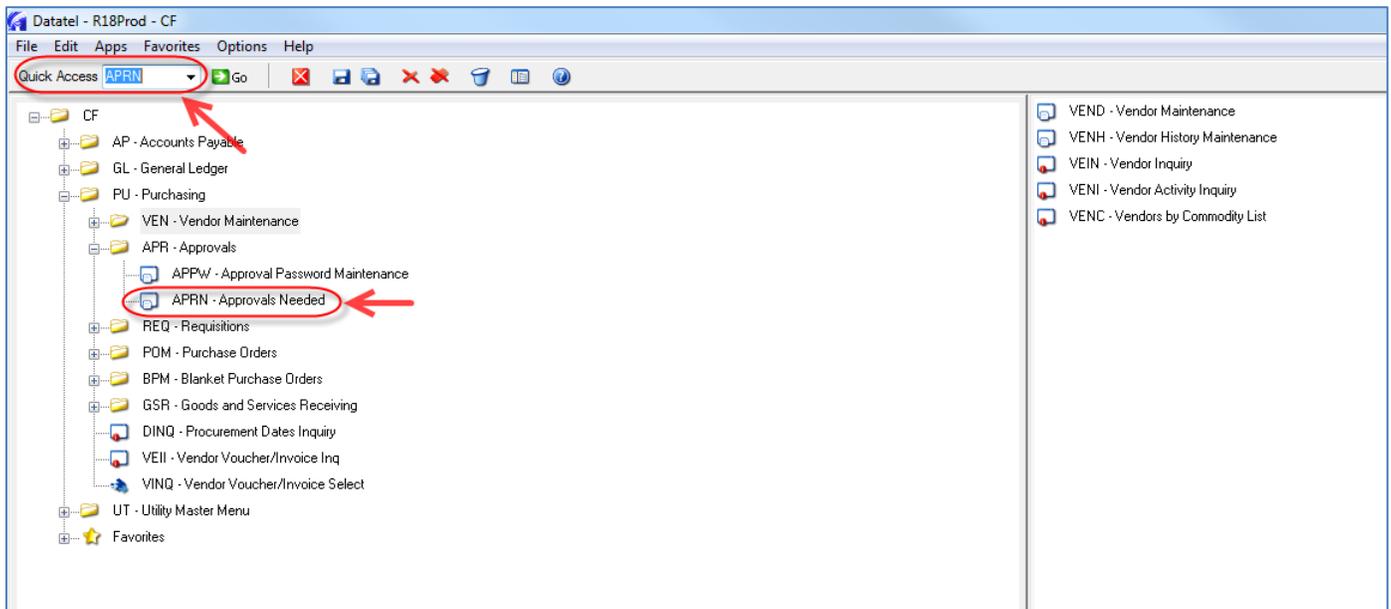
Unauthorized use or release of this information is prohibited. Any violation of this policy is subject to discipline and possible prosecution.

OK

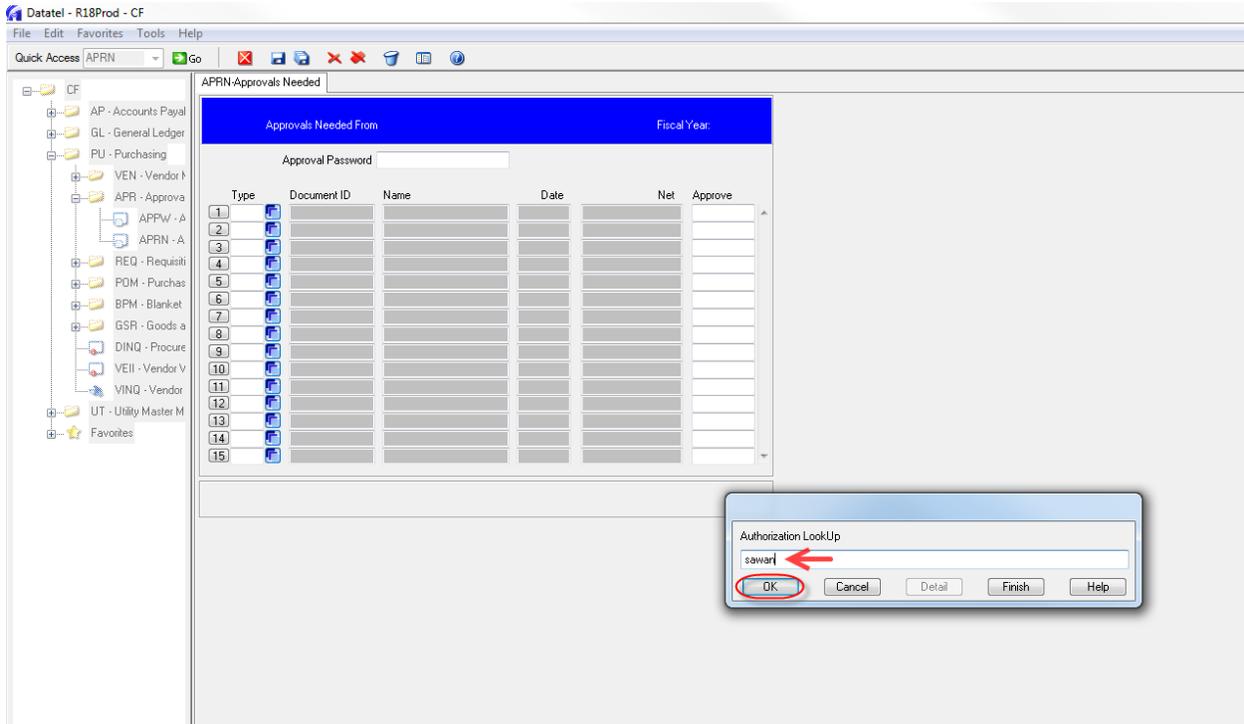
3. Datatel will open to the homepage. To access the financial module, Select Apps On the Tool Bar and then select CF.



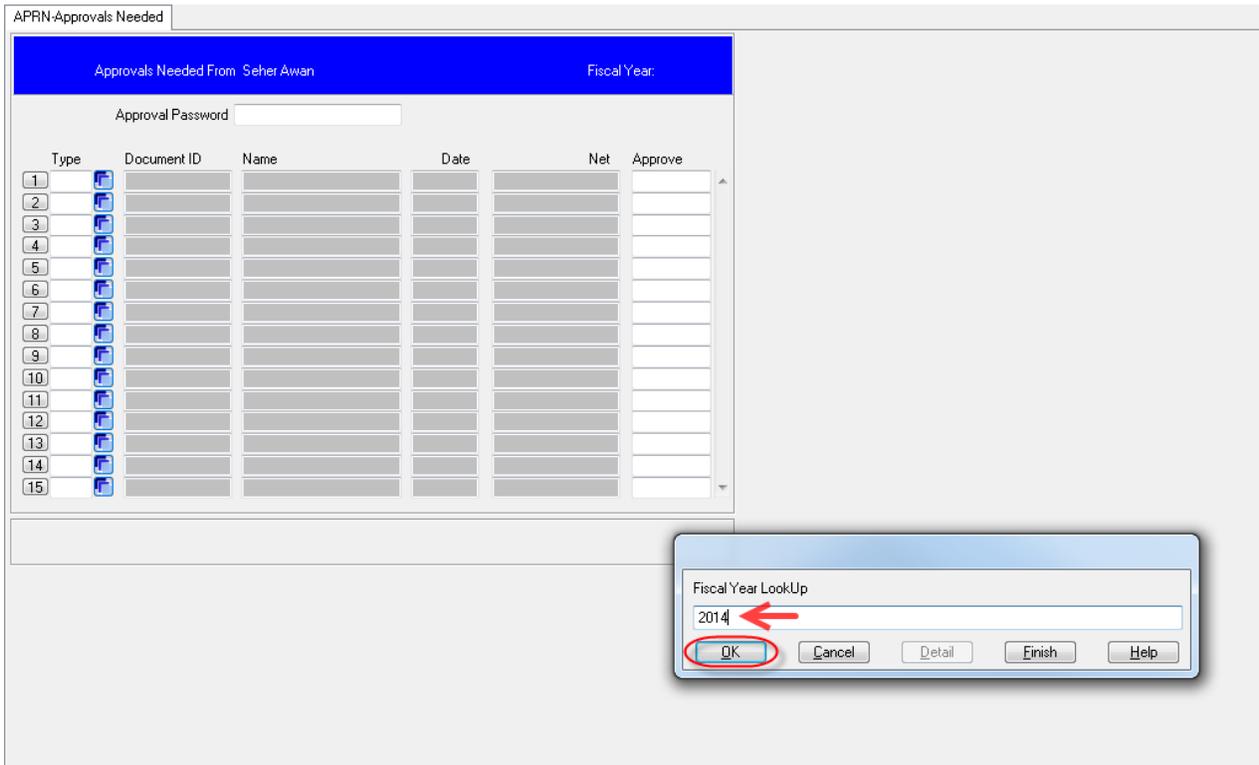
4. To access APRN, either Type APRN into the Quick Access Field, or Select Purchasing on the left hand side of the screen, then APR-Approvals, then APRN-Approvals Needed



5. Enter your Datatel User Name in the Authorization Lookup popup. Then select OK.
NOTE: Your username is most commonly your first initial and last name (one word)



6. Enter the correct fiscal year. Then select OK.



7. Enter your Requisition Approval Password. Then select OK to continue.

NOTE: This is NOT the same as your Datatel password. This must be created in APPW in Datatel.

The screenshot shows the 'APRN-Approvals Needed' window. At the top, it says 'Approvals Needed From Seher Awan' and 'Fiscal Year: 2014'. Below this is an 'Approval Password' input field. A table lists 15 requisitions with columns for Type, Document ID, Name, Date, Net, and Approve. A small dialog box is overlaid on the bottom right, titled 'Enter your approval password', with a password field (indicated by a red arrow) and buttons for 'OK', 'Cancel', 'Detail', 'Finish', and 'Help'.

Type	Document ID	Name	Date	Net	Approve
1) REQ	0028904	Lids Team Sports	07/24/13	1,516.65	No
2) REQ	0028913	SARS Software Produ	07/26/13	5,940.00	No
3) REQ	0028922	Sport & Cycle, Inc	07/29/13	1,432.38	No
4) REQ	0028895	Freedom Scientific	07/22/13	4,609.85	No
5) REQ	0028906	Ai Squared	07/25/13	2,037.75	No
6) REQ	0028931	Sportdecals Inc	07/30/13	808.76	No
7) REQ	0028838	ACT, Inc	07/11/13	1,987.02	No
8) REQ	0028897	Freedom Scientific	07/23/13	5,888.35	No
9) REQ	0028914	Troxell Communicati	07/26/13	5,235.01	No
10) REQ	0028919	D3 Sports, Inc.	07/26/13	1,412.67	No
11)					
12)					
13)					
14)					
15)					

8. You will now be able to access all of the requisitions waiting for your approval. You should begin by drilling down to view the details of each requisition. You can select F2 or your keyboard or select the blue Drill Down icon.

The screenshot shows the 'APRN-Approvals Needed' window after the password has been entered. The 'Approval Password' field is now filled with asterisks. A red arrow points to the blue 'Drill Down' icon in the first row of the requisition table.

Type	Document ID	Name	Date	Net	Approve
1) REQ	0028904	Lids Team Sports	07/24/13	1,516.65	No
2) REQ	0028913	SARS Software Produ	07/26/13	5,940.00	No
3) REQ	0028922	Sport & Cycle, Inc	07/29/13	1,432.38	No
4) REQ	0028895	Freedom Scientific	07/22/13	4,609.85	No
5) REQ	0028906	Ai Squared	07/25/13	2,037.75	No
6) REQ	0028931	Sportdecals Inc	07/30/13	808.76	No
7) REQ	0028838	ACT, Inc	07/11/13	1,987.02	No
8) REQ	0028897	Freedom Scientific	07/23/13	5,888.35	No
9) REQ	0028914	Troxell Communicati	07/26/13	5,235.01	No
10) REQ	0028919	D3 Sports, Inc.	07/26/13	1,412.67	No
11)					
12)					
13)					
14)					
15)					

9. Once you drill down, you will be able to view the requestor, the number of line items, and the approval queue.

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13

Requisition Date: 07/24/13 Maintenance Date: 07/24/13
 Initiator: **Admir Ramic** Requisition Amt: 1,516.65
 Desired Date: 07/26/13

Vendor ID: 0655963 Types: 1 DTH Other
 Name: 1 Lids Team Sports
 Address: 1 15865 SW 74th Ave, Ste 110
 City/St/Zp: Tigard OR 97224
 Country: Terms: N3 Net 30
 Currency: FOB: Commodity: Ship To: DW SJ/ECCD Warehouse
 Ship Via: Requisition Done: **Yes**

Approvals: 1 Duncan Graham Line Items: 9
 Buyer: Printed Comments: 1
 Expire Date: Comments: 1 Pleas
 AP Type: 0011 Regular Accounts Pay Priority: 3 Routin
 Invn Store: Requisition Done: **Yes**

10. It is recommended that you drill down in the line items to view the details of what are being purchased and the accounts being used to make the purchase.

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13
 Vendor.....: Lids Team Sports

	Description	Quantity	Estimated Price	Extended Price	Tax
1	Nike Victor Woven	4.000	50.5000	202.00	Yes
2	Nike Victor Woven	3.000	50.5000	151.50	Yes
3	Nike Victor Woven	3.000	50.5000	151.50	Yes
4	Nike Coaches Hot Jacket-0	4.000	40.7500	163.00	Yes
5	Nike Coaches Hot Jacket-0	3.000	40.7500	122.25	Yes
6	Nike Coaches Hot Jacket-0	3.000	40.7500	122.25	Yes
7	Nike Coaches Cap-0	12.000	18.0000	216.00	Yes
8	Nike Sideline Knit-0	12.000	16.7000	200.40	Yes
9	S&H Charge	1.000	71.4500	71.45	
10					
11					
12					
13					
Taxes				Amounts	Item Total
1	CA Santa Clara Sales Tax		116.30		1,400.35
2					
				Tax Total	116.30
				Req Total	1,516.65

11. You can view the account numbers for each line item by drilling down. The account number is listed at the bottom of the screen. You can also view a detailed description for each line item.

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13

Vendor Name 1 Lids Team Sports

Commodity

Inv Item

Description 1 Nike Victor Woven

2 Jacket-0 Black, Size XL

Est Price 50.5000

Quantity 4.000

Unit of Issue EA Each

Trade Disc Amt

Trade Disc Pct

Extended Price 202.00

Work Or/Type/Flg

Tax Codes 1 CA Santa Clara Sales Tax

GL Account No 1 10-11-0822-00000-54100

Percent 100.000

Quantity 4.000

GL Amt 202.00

Proj ID

Desired Date 07/26/13

Fixed Asset

Vendor Part

Form/Box/Loc

Comments 1

12. Once you have reviewed the details. Exit out of the screens by selecting F10 on your keyboard or the single X on the tool bar. You should return to the original requisition information screen. Here, you can access the approval queue. You will be able to view who the last approver was. To access the approval queue, F2 on your keyboard or Drill Down by selecting the icon.

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13

Requisition Date 07/24/13

Initiator Admir Ramic

Desired Date 07/26/13

Maintenance Date 07/24/13

Requisition Amt 1,516.65

Vendor ID 0655963

Name 1 Lids Team Sports

Address 1 15865 SW 74th Ave, Ste 110

City/St/Zp Tigard OR 97224

Country

Currency

Ship To D/W SJ/ECCD Warehouse

Ship Via

Types 1 OTH Other

Terms N3 Net 30

FOB

Commodity

Approvals 1 Duncan Graham

Buyer

Expire Date

AP Type 0011 Regular Accounts Pay

Invn Store

Line Items 9

Printed Comments 1

Comments 1 Pleas

Priority 3 Routin

Requisition Done Yes

13. Once you access the approval queue, you will see the individuals who have already approved the requisition in the left column. The right column will show all of the approvals still needed. To approve the requisition, enter your username in the next field available in the Approvals Column, then press the down arrow on your keyboard.

NOTE: You should always ensure that the requisitions are being sent to your business office. You do this by entering their username in the next approvals column. The Next Approvals Column should never be blank.

Approvals	Dates	Next Approvals
1 Duncan Graham	07/26/13	1 Seher Awan
2 sawar		2 Peggy Graham
3		3
4		4
5		5
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

14. You will be prompted for your requisition approval password. Enter your password and select OK.

REQUISITION MAINTENANCE
Authorizations

Approvals	Dates	Next Approvals
1 Duncan Graham	07/26/13	1 Seher Awan
2 sawar		2 Peggy Graham
3		3
4		4
5		5
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

Controller Approvals Adding Value 2

Enter Password

.....

OK Cancel Detail Finish Help

15. Once you select ok, you will see your name appear in the approvals column along with the approval date. You will also notice that your name disappears from the Next Approvals column.

The screenshot shows the 'REQUISITION MAINTENANCE Authorizations' window. It has three columns: 'Approvals', 'Dates', and 'Next Approvals'. The 'Approvals' column contains a list of 15 rows. Row 1 has 'Duncan Graham' and '07/26/13'. Row 2 has 'Seher Awan' and '07/30/13', and this row is circled in red. The 'Dates' column contains dates for each row. The 'Next Approvals' column contains a list of 5 rows. Row 1 has 'Peggy Graham'. A red arrow points to the 'Next Approvals' column header.

Approvals	Dates	Next Approvals
1 Duncan Graham	07/26/13	1 Peggy Graham
2 Seher Awan	07/30/13	2
3		3
4		4
5		5
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

16. It is very important that you save your approval. Select F10 on your keyboard or select save on the toolbar. Then select Update to save your approval.

The screenshot shows the 'REQUISITION MAINTENANCE Authorizations' window with an 'Alert' dialog box open. The 'Alert' dialog box has the text 'Update record, Cancel record or Return to editing' and three buttons: 'Update', 'Cancel', and 'Return'. The 'Update' button is circled in red, and a red arrow points to it. The 'REQUISITION MAINTENANCE Authorizations' window shows the 'Approvals' column with 'Duncan Graham' and 'Seher Awan' in rows 1 and 2 respectively. The 'Dates' column shows '07/26/13' and '07/30/13'. The 'Next Approvals' column shows 'Peggy Graham' in row 1.

Approvals	Dates	Next Approvals
1 Duncan Graham	07/26/13	1 Peggy Graham
2 Seher Awan	07/30/13	2
3		3
4		4
5		5
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

17. You will be returned to the original requisition information screen. You will be able to see that your name is entered as the last approval in the approvals field.

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13

Requisition Date: 07/24/13 Maintenance Date: 07/24/13
Initiator: Admir Ramic Requisition Amt: 1,516.65
Desired Date: 07/26/13

Vendor ID: 0655963 Types: 1 OTH Other
Name: 1 Lids Team Sports
Address: 1 15865 SW 74th Ave, Ste 110
City/St/Zp: Tigard OR 97224
Country: Terms: N3 Net 30
Currency: FOB: Ship To: DW SJ/ECCD Warehouse
Ship Via: Commodity: Line Items: 9

Approvals: 2 SAWAN Printed Comments: 1
Buyer: Comments: 1 Pleas
Expire Date: Priority: 3 Routin
AP Type: 0011 Regular Accounts Pay Requisition Done: Yes
Invn Store:

18. To save your approval, select F10 on your keyboard or select the save icon. Then select Update to save the approval.

Datatel - R18Prod - CF

APRN-Approvals Needed REQ-Requirement Maintenance

Requisition: 0028904 Status: Not Approved Status Date: 07/24/13

Requisition Date: 07/24/13 Maintenance Date: 07/24/13
Initiator: Admir Ramic Requisition Amt: 1,516.65
Desired Date: 07/26/13

Vendor ID: 0655963 Types: 1 OTH Other
Name: 1 Lids Team Sports
Address: 1 15865 SW 74th Ave, Ste 110
City/St/Zp: Tigard OR 97224
Country: Terms: N3 Net 30
Currency: FOB: Ship To: DW SJ/ECCD Warehouse
Ship Via: Commodity: Line Items: 9

Approvals: 2 Seher Awan Printed Comments: 1
Buyer: Comments: 1 Pleas
Expire Date: Priority: 3 Routin
AP Type: 0011 Regular Accounts Pay Requisition Done: Yes
Invn Store:

Alert
Update record, Cancel record or Return to editing
Update Cancel Return

19. You will be returned to the Requisition Approval Queue. “Approved” should now appear in the Approve column verifying that your approval has been saved. You can continue to approve the remaining requisitions within your queue.

Approvals Needed From Seher Awan						Fiscal Year: 2014
Approval Password *****						
Type	Document ID	Name	Date	Net	Approve	
1	REQ	Lids Team Sports	07/24/13	1,516.65	Approved	
2	REQ	SARS Software Produ	07/26/13	5,940.00	No	
3	REQ	Sport & Cycle, Inc	07/29/13	1,432.38	No	
4	REQ	Freedom Scientific	07/22/13	4,609.85	No	
5	REQ	Ai Squared	07/25/13	2,037.75	No	
6	REQ	Sportdecals Inc	07/30/13	808.76	No	
7	REQ	ACT, Inc	07/11/13	1,987.02	No	
8	REQ	Freedom Scientific	07/23/13	5,888.35	No	
9	REQ	Troxell Communicati	07/26/13	5,235.01	No	
10	REQ	D3 Sports, Inc.	07/26/13	1,412.67	No	
11						
12						
13						
14						
15						