Create and Submit a Requisition in Datatel

Business Office – Purchasing

This guide explains how to create, review, submit, and track a requisition in Datatel. It covers vendor and shipping information, approvals, line items, General Ledger (GL) coding, printed comments, supporting documentation, and final submission.

Before You Begin

Gather the following information before opening Datatel:

- Vendor name or Vendor ID
- Current quote, proposal, invoice, or contract, as applicable
- Complete GL account number and confirmation that funds are available
- Item descriptions, quantities, estimated prices, tax information, and shipping charges
- Delivery location and College of the Redwoods point of contact
- Required approver information
- Any other documentation required by Purchasing

Important: For technology purchases, begin with Information Technology and use the approved quote or purchasing instructions provided for the request.

Process Overview

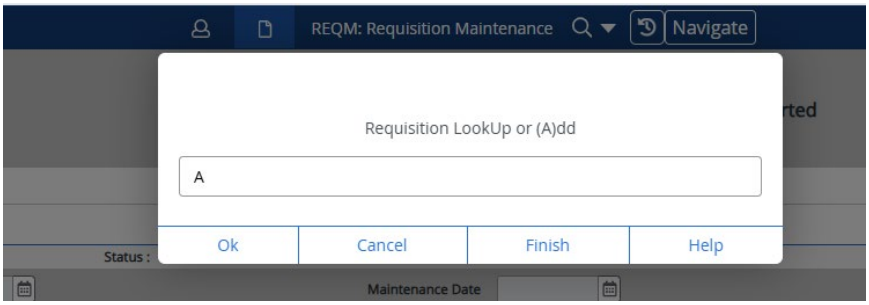
1. Start a new requisition in REQM.
2. Enter initiator, vendor, shipping, AP type, and approval information.
3. Add line items, prices, tax, and GL coding.
4. Add printed comments and supporting details.
5. Review the requisition and mark it complete.
6. Send the requisition number and required documentation to Purchasing.
7. Retrieve the completed PO or BPO in Etrieve.

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1. Start a New Requisition in REQM

Open **REQM, Requisition Maintenance**, and complete the following steps:

1. Enter **A** in the action field for **Add**.
2. Select **Okay**.

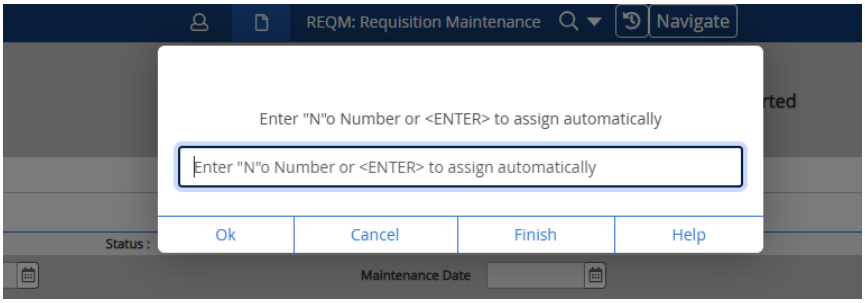


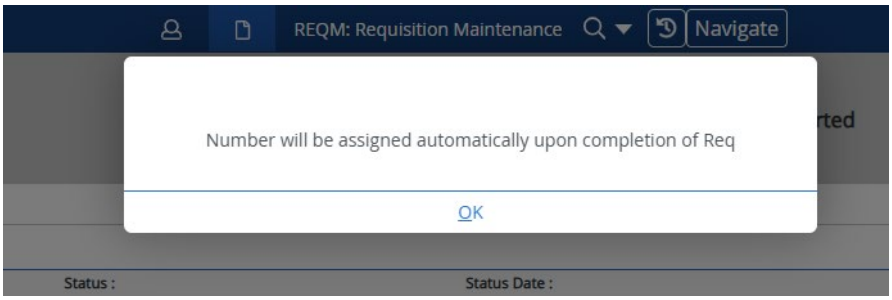
Result: Datatel opens the requisition-number window.

Requisition Number

Requisition numbers are assigned automatically.

1. Select **Okay**, or press the **Enter** key on your keyboard.
2. The next window will automatically appear.
3. Select **OK**.



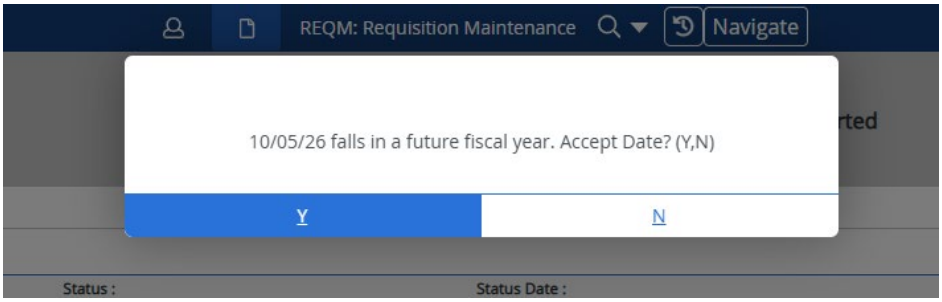


Fiscal Year Confirmation

You may see a fiscal year confirmation window.

This window will continue to appear until the Business Office closes out the previous fiscal year.

- Select **Y** to continue.



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2. Complete the REQM Requisition Details

Complete the applicable fields in **REQM, Requisition Maintenance**. Use the screenshot below to locate the fields identified in these instructions.

Tip: Refer to the screenshot below. Required fields are identified with arrows.

Initiator (This is the person entering the requisition)

Enter your **Datatel ID number**.

Vendor ID

Enter the vendor's **Vendor ID**.

If you do not know the Vendor ID:

1. Search for the vendor by name.
2. Select the correct vendor from the search results.

IMPORTANT: Do **not** manually type vendor information into the **Name** field if you are unable to locate the vendor.

If you cannot find the vendor, **contact the Purchasing Specialist** for assistance.

Ship To

Select the location where the items should be delivered.

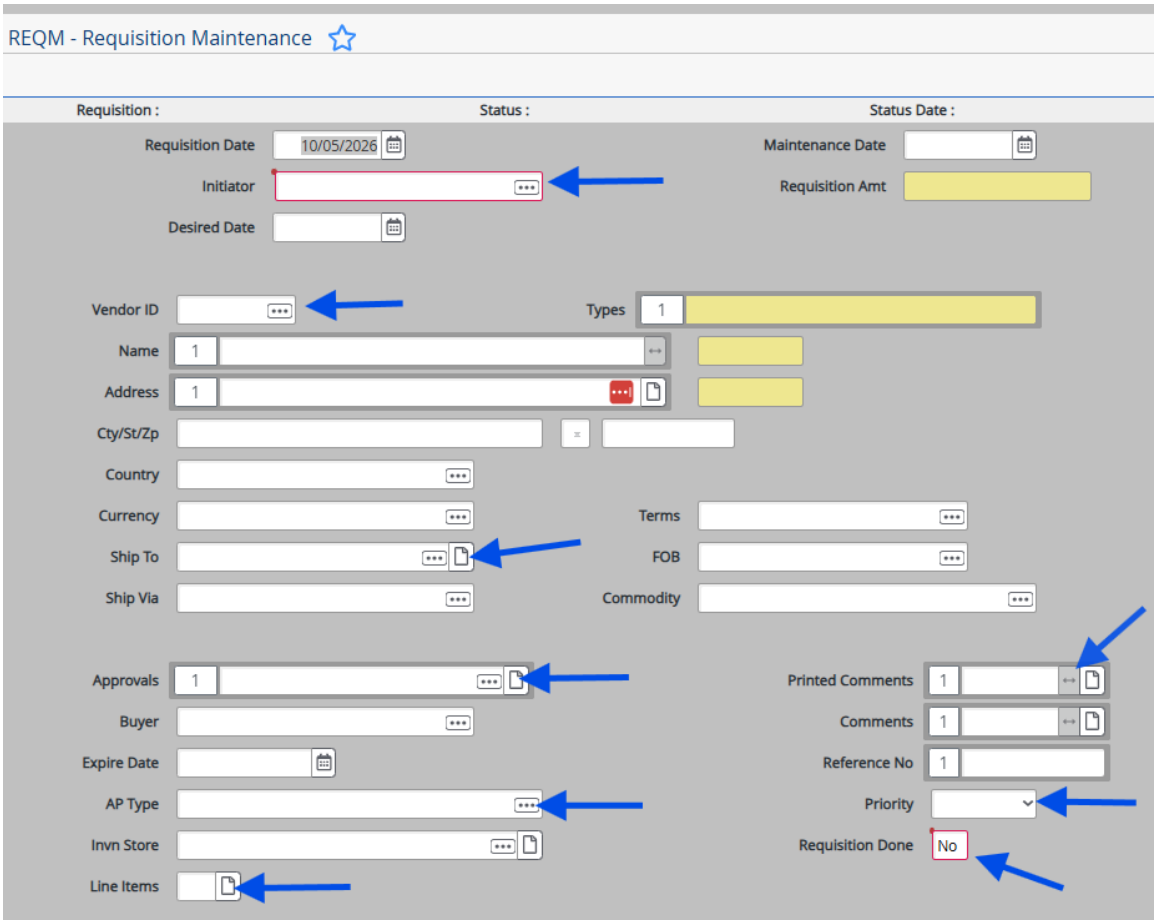
Examples include:

- **Eureka Campus Warehouse**
- **CR Del Norte Campus**
- **CR Eureka Downtown Site**

Select the location that applies to your requisition.

Approvals

Enter the manager or/and administrator who needs to approve the requisition.



See **Step 3 – Approvals** for detailed instructions.

AP Type

Select the appropriate Accounts Payable type:

- **REG** – District Payables
- **FND** – Foundation Payables

Line Items

Use the **Line Items** section to enter the items or services being purchased.

See **Step 4 – Line Items** for detailed instructions.

Printed Comments

Information entered in **Printed Comments** will appear on the Purchase Order (PO).

When entering text in this field, place a **tilde (~)** before and after the text.

Example:

~Deliver to Eureka Campus Warehouse~

See **Step 5 – Printed Comments** for detailed instructions.

Comments

Use the **Comments** field when you have been approved to use someone else's GL and you do not have access to that GL.

Enter the **full GL code** in this field.

Priority

Use the **Priority** field to indicate that the requisition is for a **Blanket Purchase Order (BPO)**.

See **Step 6 – Priority** for instructions.

Requisition Done

The **Requisition Done** field should remain **NO** while you are working on the requisition.

Once you have completed and reviewed the requisition, change this field to **YES**.

IMPORTANT: This is the final step in creating the requisition.

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3. Enter Required Approvals

From **REQM**, complete the following steps:

1. Select the drill-down button beside **Approvals**. Datatel opens **APRV, Approvals**.
2. Enter each manager or administrator required to approve the requisition in the appropriate approval sequence Under Next Approvals (right hand side).
3. Confirm that the final approval order matches current Business Office requirements.
4. Save the approvals and return to **REQM**.

Example format: John-Smith

Important: Approval requirements can change. Use the current Business Office approval guidance rather than relying on an individual's name from an older procedure.

Approval Reminder

If you use an **object code beginning with 56xxx**, the **Director of Administrative Services** must be the **final approver**.

IMPORTANT: Make sure the appropriate approval sequence is entered before completing the requisition.

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4. Add and Review Line Items

From the **REQM** screen:

1. Select the drill-down button beside **Line Items**. Datatel opens **RQIL, Requisition Item List**.
2. Select the drill-down button beside line 1. Datatel opens **RQIM, Requisition Item Maintenance**.
3. Enter the item or service description, quantity, unit of issue, estimated price, applicable tax information, and complete GL account.
4. Compare the entry with the supporting quote or documentation before saving.

Tip: Refer to the screenshot below. Required fields are identified with arrows.

Enter the appropriate information for the item or service being purchased.

Save the Line Item

After completing the required information:

1. Select **Save**.
2. Confirm that the saved line item appears in **RQIL**.
3. To add another item, select the next available line and repeat the entry process.
4. When all items are entered, return to **RQIL**.

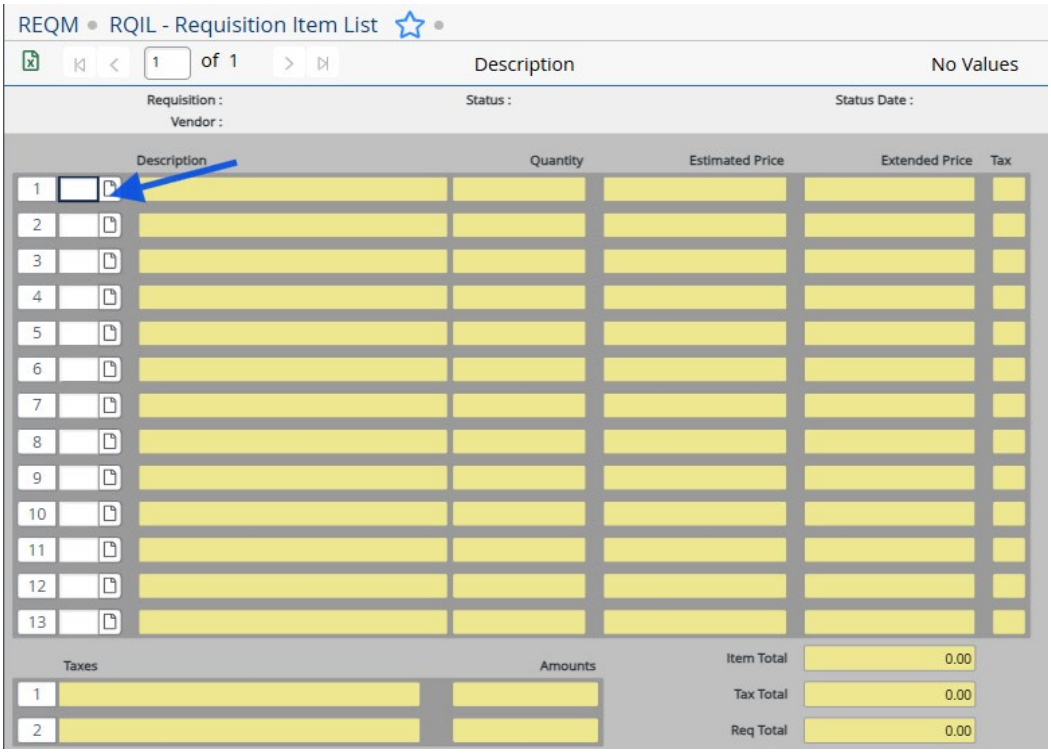
Review the Line Items

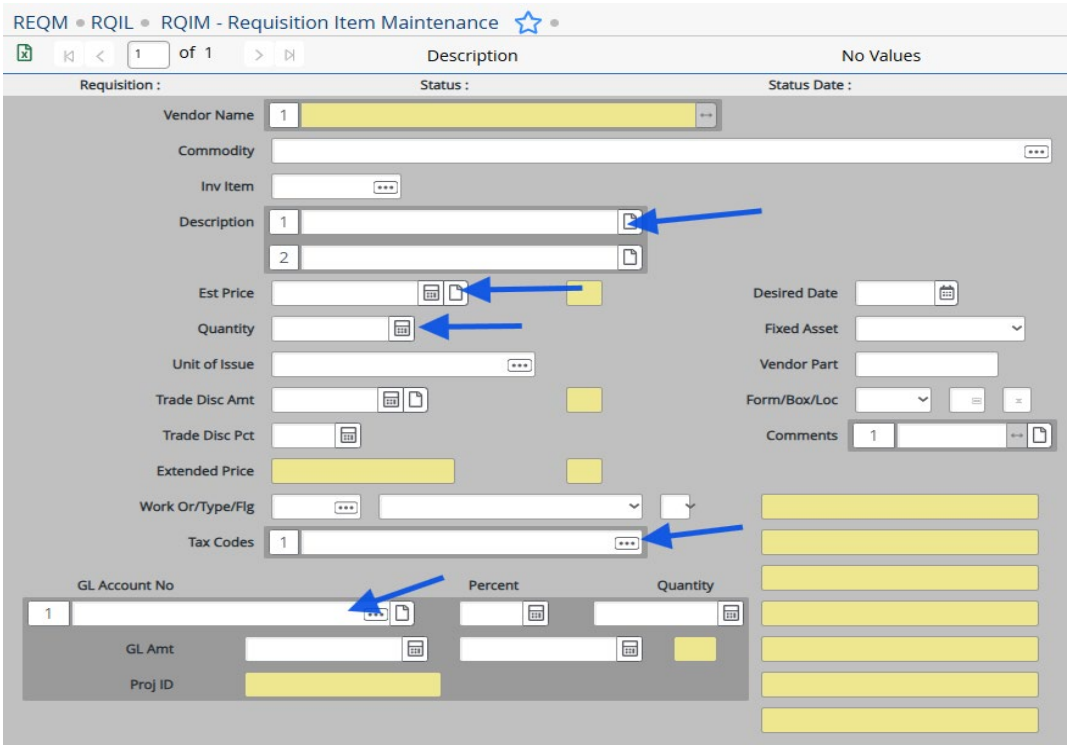
Review the line items to make sure the information is correct.

If everything is correct:

1. Click **Save**.
2. You will be returned to the **REQM** screen.

IMPORTANT: Review quantities, descriptions, prices, GL information, and other required information before saving.





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5. Add Printed Comments

From the **REQM** screen:

1. Drill into the **Printed Comments** section.
2. This will open the comments screen.
3. Enter the following information:

Information to Include

- **Department**
- **Fiscal Year**
- **Quote Number**
- **Description of Items Ordered**
- **Contract Number**, if a contract is being used
- **Point of Contact at CR**
- **Place or Person to Deliver Items To**

Example

Department: Business Office
Fiscal Year: 2026-27
Quote #: 12345
Description: Office supplies
Contract #: 2026-XX
CR Contact: Jane Smith
Deliver To: Eureka Campus Warehouse

Remember to use the **tilde (~)** before and after the text so that the information will print on the PO.

Example:

~Business Office, FY: 2026-27, Quote #: 12345, Office supplies, Contact: Jane Smith, Deliver To: Eureka Campus Warehouse~

~Business Office, FY2026-27, Contract 2026-1, Professional Services & Technical Support, CR contact Jane Smith, No de

Save the Comments

After entering the required information:

1. Click the **Save** icon.
2. Your information will be saved.

3. You will be returned to the **REQM** screen.

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6. Select the Requisition Type

In **REQM**, use the **Priority** field to identify the requisition type:

- Select **Blanket Purchase Order** only when the purchase meets current Business Office criteria for a BPO.
- Select **O Place Order** for a standard purchase order.

Blanket Purchase Order (BPO): May be used multiple times during the fiscal year.

Purchase Order (PO): Use for a specific purchase entered as defined line items.

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7. Review and Complete the Requisition

Before completing the requisition, review all information carefully.

Check that:

- Vendor is correct
- Ship-to location is correct
- Approvals are correct
- AP Type is correct
- Line items are complete
- GL information is correct
- Printed Comments are complete
- Contract number is included, if applicable
- Priority is correct if this is a BPO

Mark Requisition Done

Once you have confirmed that everything is correct:

1. Change **Requisition Done** from **NO** to **YES**.
2. Review the requisition one final time.

3. Click the **Save** icon.

IMPORTANT: Changing **Requisition Done** to **YES** indicates that you have completed the requisition.

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8. Send Support Documentation to Purchasing Email

After the requisition is complete and approved, send Purchasing the requisition number and all required supporting documentation, such as the current quote, proposal, contract, or invoice.

Email Subject Line

Use the following format:

REQ 0039570 Pierson

Replace the requisition number and vendor name with the appropriate information.

Supporting Documentation

Attach the documentation required by the current Business Office process. Make sure the requisition line items and total can be reconciled to the supporting documentation.

Important: Documentation requirements may vary by transaction type. Confirm any exceptions with Purchasing before omitting a quote or other support.

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9. Retrieve the Completed PO or BPO in Etrieve

After Purchasing processes the requisition, the completed purchase order (PO) or blanket purchase order (BPO) will be available to the requester in Etrieve. Retain the requisition number so you can match the Etrieve document to the original request.

Final Review Checklist

Before submitting your requisition to Purchasing, confirm:

☐ Initiator is correct
☐ Correct vendor is selected
☐ Ship-to location is correct

☐ AP type is correct
☐ Required approvers are entered in the correct sequence
☐ Every quoted item is represented
☐ Quantities, descriptions, and estimated prices are correct
☐ Tax and shipping information are correct
☐ Complete GL coding is entered and verified
☐ Requisition total matches the supporting documentation
☐ Printed comments include the department, fiscal year, quote or contract reference, College contact, and delivery instructions, as applicable
☐ PO or BPO type is correct
☐ Requisition Done is changed to **YES** only after the final review
☐ Requisition is saved
☐ Requisition number is retained
☐ Required documentation is sent to Purchasing
☐ Completed PO or BPO is retrieved from Etrieve

Datatel Requisition Quick-Reference Checklist

Use this one-page checklist to create, review, submit, and track a requisition.

Stage	Quick Check
1. Prepare	☐ Vendor name or ID ☐ Current quote, proposal, invoice, or contract ☐ Complete GL account and available funds ☐ Descriptions, quantities, pricing, tax, and shipping ☐ Delivery location, CR contact, and approvers ☐ Technology purchases begin with IT
2. Start in REQM	☐ Open **REQM** ☐ Enter **A** for Add and select **Okay** ☐ Accept the automatically assigned requisition number ☐ Confirm the fiscal year if prompted
3. Enter Details	☐ Initiator is correct ☐ Correct vendor is selected; do not manually type an unknown vendor ☐ Ship-to location is correct ☐ AP Type is **REG** or **FND**, as applicable ☐ Required approvers are entered in the correct sequence
4. Add Line Items	☐ Open **RQIL**, then **RQIM** ☐ Enter each description, quantity, unit, estimated price, tax, and GL account ☐ Match every line and the total to the supporting documentation ☐ Save and confirm each item appears in RQIL
5. Add Comments	☐ Include department, fiscal year, quote or contract reference, CR contact, and delivery instructions ☐ Place a tilde **(~)** before and after text that must print on the PO ☐ Save and return to REQM
6. Review and Complete	☐ Select the correct PO or BPO type ☐ Recheck vendor, approvals, line items, tax, shipping, GL coding, comments, and total ☐ Change **Requisition Done** to **YES** only after final review ☐ Save and retain the requisition number
7. Submit and Track	☐ Send Purchasing the requisition number and required documentation ☐ Email subject format: **REQ [number] [vendor]** ☐ Retrieve the completed PO or BPO from Etrieve