



## PURCHASE REQUISITIONS

PURCHASE REQUISITION APPROVAL

PURCHASING 701.5.2

### OVERVIEW

- ▶ **PURCHASE REQUISITION APPROVAL:** The purchase order approvals are required before requisitions can be rolled into purchase orders. The approval path is determined by GL account number. Special approvals are required for purchases of technology items, any purchase from restricted accounts and for any purchase of radioactive materials. All purchase requisitions receive final approval from a Purchasing Agent.
- ▶ **CONTACT:** The contact for “Purchase Requisition Approval” is the Office of Support Services (783-2018)

### LOGIN

- ▶ Login to Datatel/Colleague  
  
See Section 402 or 403 for login instructions. If you do not have a Datatel account, please contact the Office of Institutional Research and Computer Applications (783-2009).

\*NOTE – Purchase requisition approval is **NOT** available through WebAdvisor at this time.\*



### GETTING AROUND

- ▶ See Section 501 for assistance in Getting Around the system.

## PURCHASE REQUISITION APPROVAL

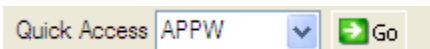
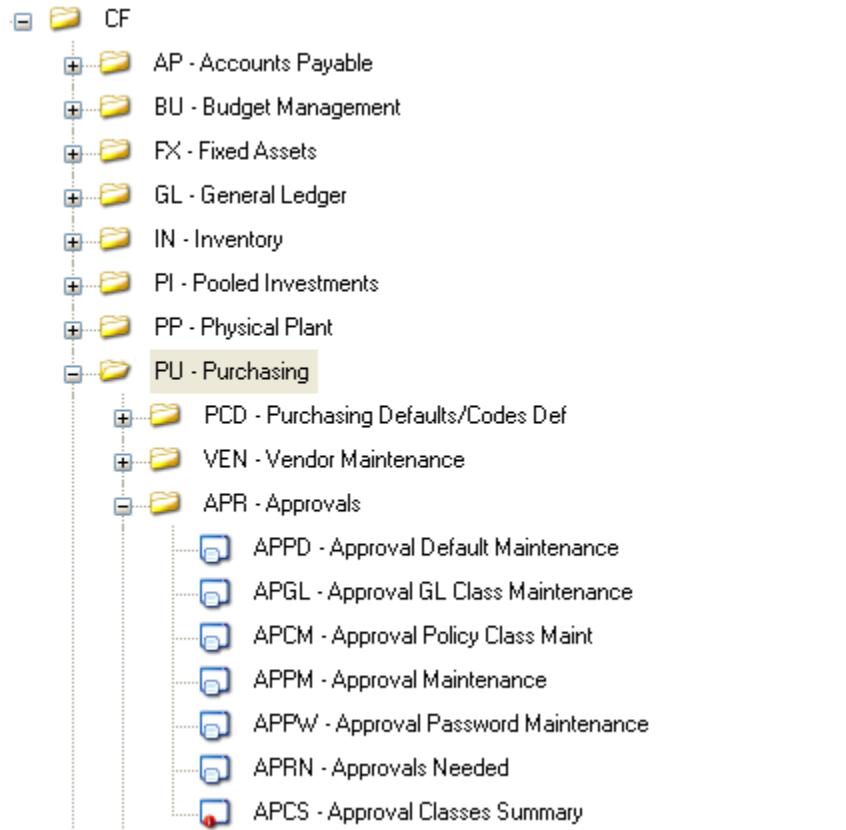
PURCHASING 701.5.2

### MENU SELECTION

- ▶ Choose **CF** under the Colleague **Apps** Menu
- ▶ Click the  to expand the **Purchasing** Menu
- ▶ Click the  to expand the **Approvals** Menu

## PURCHASE REQUISITION APPROVALS

---



### SET OR CHANGE APPROVAL PASSWORD (REQUIRED)

- ▶ Select **APPW-Approval Password Maintenance** from the **Approvals** Menu

OR

- ▶ Enter **APPW** in the Quick Access Box
- ▶ Click **GO**

APPW-Approval Password Maintenance

Approval ID

Name

Password

Approvals LookUp

OK Cancel Detail Finish Help

► Enter your Approval ID Number (M followed by your seven-digit ID number)

► Select

Approvals LookUp

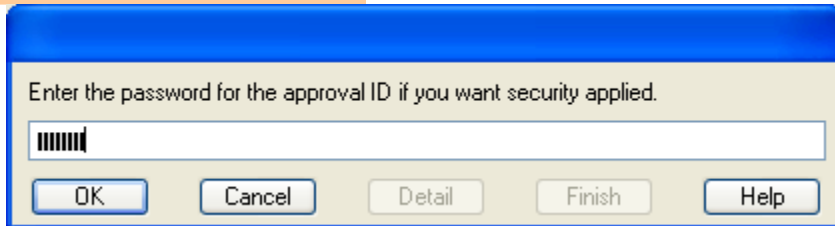
m0551274

OK Cancel Detail Finish Help

## PURCHASE REQUISITION APPROVALS

---

- ▶ Enter a password. Keep this password secure.
- ▶ Click OK.

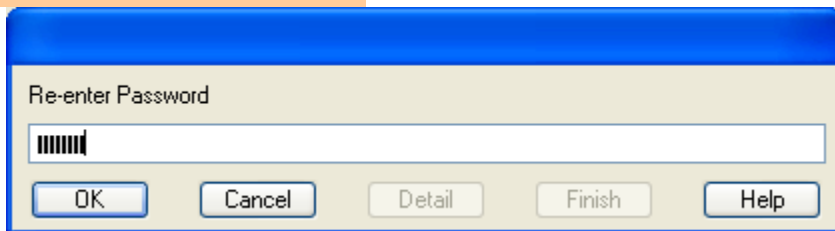


Enter the password for the approval ID if you want security applied.

■■■■■

OK Cancel Detail Finish Help

- ▶ Re-enter the password.
- ▶ Select



Re-enter Password

■■■■■

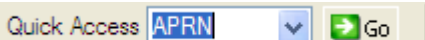
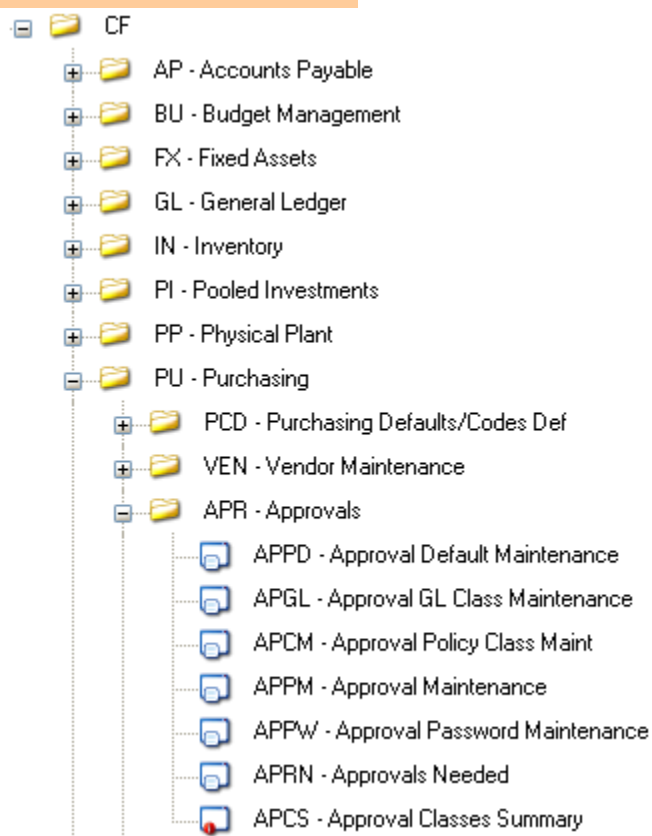
OK Cancel Detail Finish Help

- ▶ This process is only required the **first** time you approve requisitions.
- ▶ If you forget your password, or want to change it, follow the same instructions. You do **NOT** have to enter the old password.
- ▶ Choose **CF** under the Colleague **Apps** Menu
- ▶ Click the **+** to expand the **Purchasing** Menu
- ▶ Click the **+** to expand the **Approvals** Menu
- ▶ Select **APRN-Approvals Needed** from the **Approvals** Menu

### APPROVALS NEEDED

OR

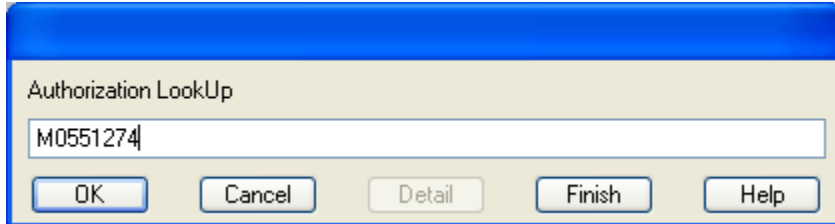
- ▶ Enter **APRN** in the Quick Access Box
- ▶ Click **GO**



- ▶ Enter your Approval ID Number (M followed by your seven-digit ID number)
- ▶ Select

## PURCHASE REQUISITION APPROVALS

---



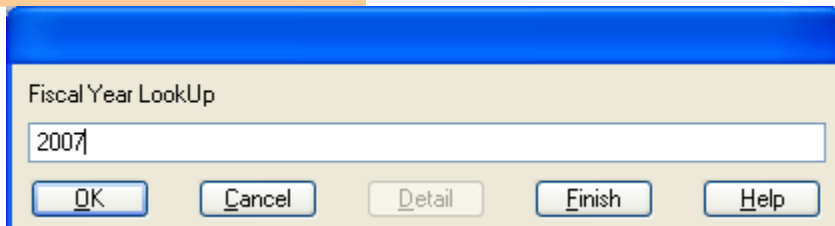
Authorization LookUp

M0551274

OK Cancel Detail Finish Help

▶ Enter the Fiscal Year or do “...” Lookup

▶ Select



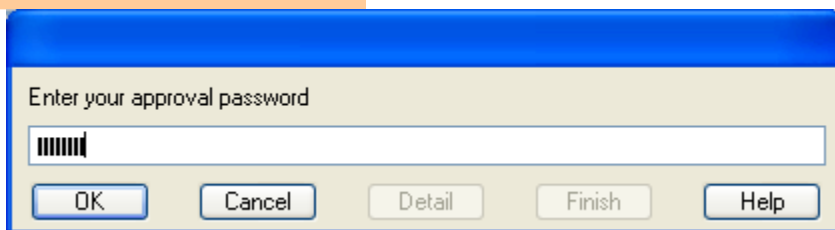
Fiscal Year LookUp

2007

OK Cancel Detail Finish Help

▶ Enter your approval password

▶ Select



Enter your approval password

\*\*\*\*\*

OK Cancel Detail Finish Help
















▶ View the APRN Screen

## PURCHASE REQUISITION APPROVALS


APRN-Approvals Needed

Approvals Needed From: Ladonna Purcell Fiscal Year: 2006

Approval Password:

Type	Document ID	Name	Date	Net	Approve
1 REQ 	0000123	Digital Intelligenc	05/18/06	451.44	No
2 REQ 	0000122	Creative Image Tech	05/17/06	2,687.00	No
3 REQ 	0000121	Kenway Distributors	05/16/06	33,532.50	No
4 REQ 	0000120	Steck-Vaughn Co.	05/16/06	320.10	No
5 REQ 	0000119	Gateway Business	05/16/06	739,500.00	No
6 REQ 	0000118	Brown Mech.	05/16/06	1,660.00	No
7 REQ 	0000117	Source 4	05/16/06	16,875.00	No
8 REQ 	0000116	Koch Air Conditioni	05/16/06	111,304.00	No
9 REQ 	0000115	Rogers Corp.	05/16/06	1,768.18	No
10 REQ 	0000114	Journey Education M	05/16/06	8,207.60	No
11 REQ 	0000113	McCoy, Mccoy Inc.	05/16/06	909.60	No
12 REQ 	0000112	Facts on File, Inc.	05/16/06	95.00	No
13 REQ 	0000111	Wire One Tech., Inc	05/16/06	1,209.00	No
14 REQ 	0000110	Great Lakes Clay	05/16/06	12,492.00	No
15 REQ 	0000109	Lyon's Masonry	05/16/06	5,900.00	No


Controller Approvals Value 1/32

- ▶ Click the Detail Button  next to the item you wish to approve.
- ▶ This will open the **REQM** Screen.

## PURCHASE REQUISITION APPROVALS

APRN-Approvals Needed		REQM-Requisition Maintenance	
Requisition: 0000123		Status: Not Approved	
Status Date: 05/18/06			
Requisition Date	05/18/06	Maintenance Date	
Initiator	Mr. James A. Fluty	Requisition Amt	451.44
Desired Date			
Vendor ID	0000307	Types	1
Name	1 Digital Intelligence System Co		
Address	1 4151 Lafayette Center Dr		
City/St/Zp	Chantilly VA 20151		
Country		Terms	
Currency		FOB	
Ship To	SS Morehead State Un	Commodity	
Ship Via			
Approvals	1	Line Items	5
Buyer		Printed Comments	1 E & I
Expire Date		Comments	1
AP Type	AP Vendor Payables	Priority	
Invn Store		Requisition Done	Yes

### VIEW REQUESTED ITEMS

- ▶ Click the Detail Button  next to “Line Items” to view the goods or services requested.
- ▶ This opens **RQIL** (item summary) screen.



## PURCHASE REQUISITION APPROVALS

APRN-Approvals Needed    REQM-Requisition Maintenance    RQIL-Requisition Item List    RQIM-Requisition Item Maintenance

Requisition: 0000142      Status: Not Approved      Status Date: 05/19/06

Vendor Name 1 Rickly Hydrological

Commodity

Inv Item

Description 1 SP100-0261

2 shaker, Steve, Tyler

Est Price 3,070.0000

Quantity 1.000

Unit of Issue EA Each

Trade Disc Amt

Trade Disc Pct

Extended Price 3,070.00

Work Or/Type/Flg

Tax Codes 1

GL Account No 10-60002000-5103100

Percent 100.000

Quantity 1.000

GL Amt 3,070.00

Proj ID

Desired Date






Fixed Asset

Vendor Part

Form/Box/Loc

Comments 1

Controller Description	Value 1/3

- ▶ Click the Save button  to exit **RQIM** screen.
- ▶ Click Update  in the Alert box.
- ▶ Click the Save button  to exit **RQIL** screen.
- ▶ Click Update  in the Alert box.
- ▶ Click the Drill Down button  next to Approvals on the **REQM** screen



## PURCHASE REQUISITION APPROVALS

### APPROVE REQUISITION

- ▶ Enter your Approval ID (M followed by your seven-digit ID number) on first **empty** line in Approvals column on **left** side of screen (**Approvals**).
- ▶ Press Enter or Tab

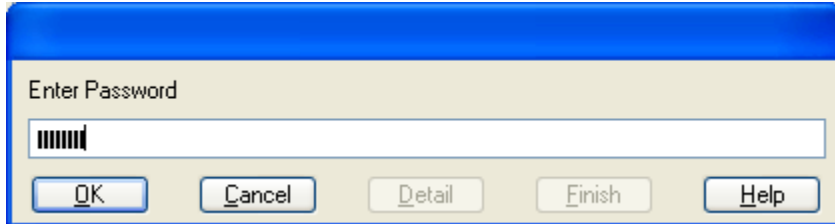
The screenshot shows a software window titled "REQUISITION MAINTENANCE" with a sub-header "Authorizations". The window has three tabs: "APRN-Approvals Needed", "REQM-Requisition Maintenance", and "APRV-Approvals". The main area is divided into three columns: "Approvals", "Dates", and "Next Approvals".

Approvals	Dates	Next Approvals
1 m0551274		1 Ladonna Purcell
2		2 Andrea Cornett
3		3 Paige McDaniel
4		4
5		5
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

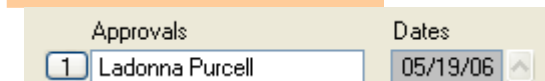
At the bottom of the window, there is a section for "Controller Approvals Approval LookUp" with the text "No Values" displayed.


- ▶ Enter approval password in **Enter Password** box

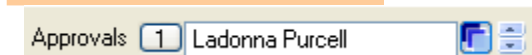
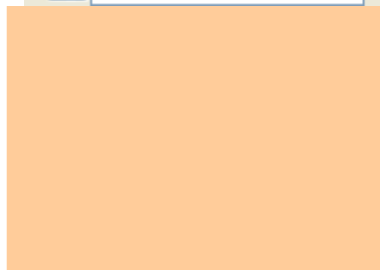
- ▶ Click





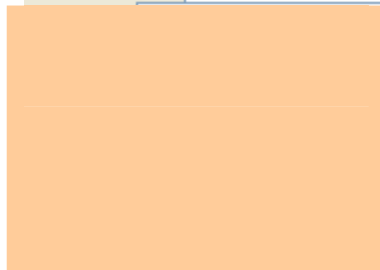
- ▶ Approver's name and date are populated.



- ▶ Press the Save button  to save approval
- ▶ Click  in Alert box
- ▶ **REQM** screen shows your approval



- ▶ Press Save button  to exit the **REQM** screen
- ▶ Click 
- ▶ **APRN** Screen shows your Approval




















## PURCHASE REQUISITION APPROVALS

APRN-Approvals Needed


Approvals Needed From: Ladonna Purcell Fiscal Year: 2006

Approval Password:


Type	Document ID	Name	Date	Net	Approve
1 REQ 	0000139	Jsa Technologies	05/19/06	21,860.70	Approved 
2 REQ 	0000123	Digital Intelligenc	05/18/06	451.44	No
3 REQ 	0000122	Creative Image Tech	05/17/06	2,687.00	No
4 REQ 	0000121	Kenway Distributors	05/16/06	33,532.50	No
5 REQ 	0000120	Steck-Vaughn Co.	05/16/06	320.10	No
6 REQ 	0000119	Gateway Business	05/16/06	739,500.00	No
7 REQ 	0000118	Brown Mech.	05/16/06	1,660.00	No
8 REQ 	0000117	Source 4	05/16/06	16,875.00	No
9 REQ 	0000116	Koch Air Conditioni	05/16/06	111,304.00	No
10 REQ 	0000115	Rogers Corp.	05/16/06	1,768.18	No
11 REQ 	0000114	Journey Education M	05/16/06	8,207.60	No
12 REQ 	0000113	McCoy, Mccoy Inc.	05/16/06	909.60	No
13 REQ 	0000112	Facts on File, Inc.	05/16/06	95.00	No
14 REQ 	0000111	Wire One Tech., Inc	05/16/06	1,209.00	No
15 REQ 	0000110	Great Lakes Clay	05/16/06	12,492.00	No 

Element Approvals Value 1/33

**LOGOUT**

- ▶ Repeat for each item listed
- ▶ Press the Save Button  to exit the **APRN** screen
- ▶ Press  to return to the Main Menu.
- ▶ See Section 402 or 403 for logout procedures.

**DISAPPROVE  
REQUISITION**

- ▶ Press the Cancel All  Button from the **REQM** screen to return to Main Menu
  - ▶ Send the initiator an E-mail indicating reason you do not approve
- OR
- ▶ Call the initiator with reason you do not approve



Last Revision: 1/3/07