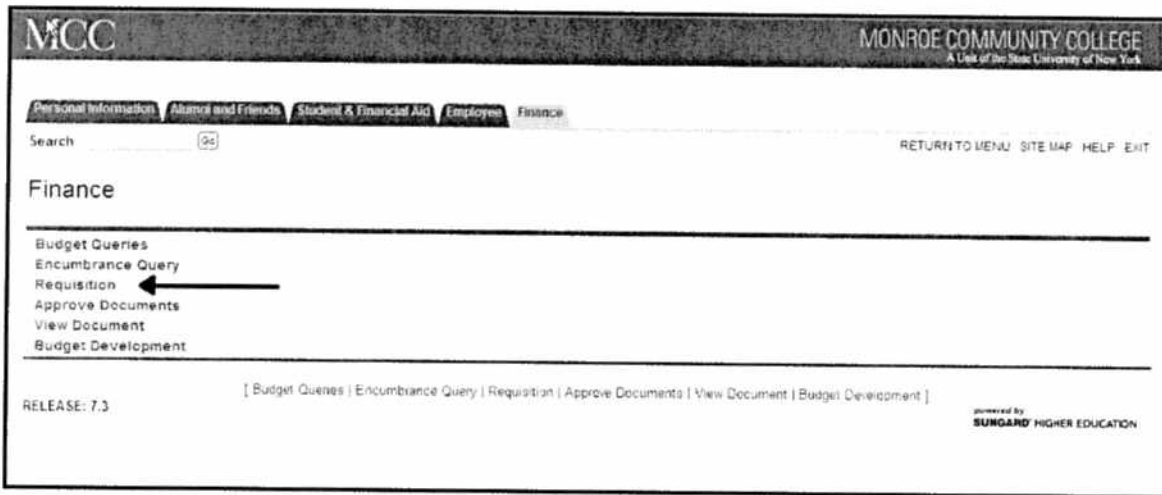


**CREATING A PURCHASE REQUISITION  
IN FY-09**



Navigate to options screen in Banner Finance Self Service and Click on 'Requisition'

### Changing the dates on the Requisition:

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Requisition

Begin by creating a requisition or retrieving an existing template. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select item number link to add item Text for a commodity.

Choose Validate if desired to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing.

Use Template: None [Retrieve]

Transaction Date: 1 SEP 2008 ← 1

Delivery Date: 1 SEP 2008

Vendor ID: [Vendor Validate]

Address Type: Address Sequence

Vendor Contact: [Vendor E-mail]

Requestor Name: PATRICK BATES

Requestor E-mail: pbates@monroecc.edu

Phone Area: 585 Phone: 2922000 Ext: 2820

FAX Area: 585 FAX Number: 4245296 FAX Ext:

**1** The 'transaction date' and 'delivery date' will always default to the current date. When creating a requisition in August for the FY-09 budget, the 'transaction date' and 'delivery date' must be changed to September 1, 2008 or later.

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## Requisition

Begin by creating a requisition or retrieving an existing template. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select Item number link to add Item Text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing.

Use Template: None

Transaction Date: 1 SEP 2008

Delivery Date: 1 JAN 2008

Vendor ID: [ ]

Address Type: [ ]

Vendor Contact: [ ]

Requestor Name: PATRIC

Requestor E-mail: pbates@cc.edu

Phone Area: 585 Phone: 2922000 Ext: 2820

FAX Area: 585 FAX Number: 4245298 FAX Ext: [ ]

**2** (points to the Transaction Date dropdown menu)

**2** To change the date and month, simply click on the appropriate arrow which will open a box containing valid values. Select the correct values to make both the transaction and delivery dates September 1, 2008 or later.

### IMPORTANT NOTE

Failure to change the dates to September 1, 2008 or greater, will prevent your requisition from being processed. Purchasing staff members will review dates on approved requisitions. If the staff discovers date errors, the requisition will be deleted, and the requestor will be advised to complete a new requisition. Please contact Purchasing immediately if you realize you have completed a requisition with the incorrect dates, a staff member will remove it from the system.