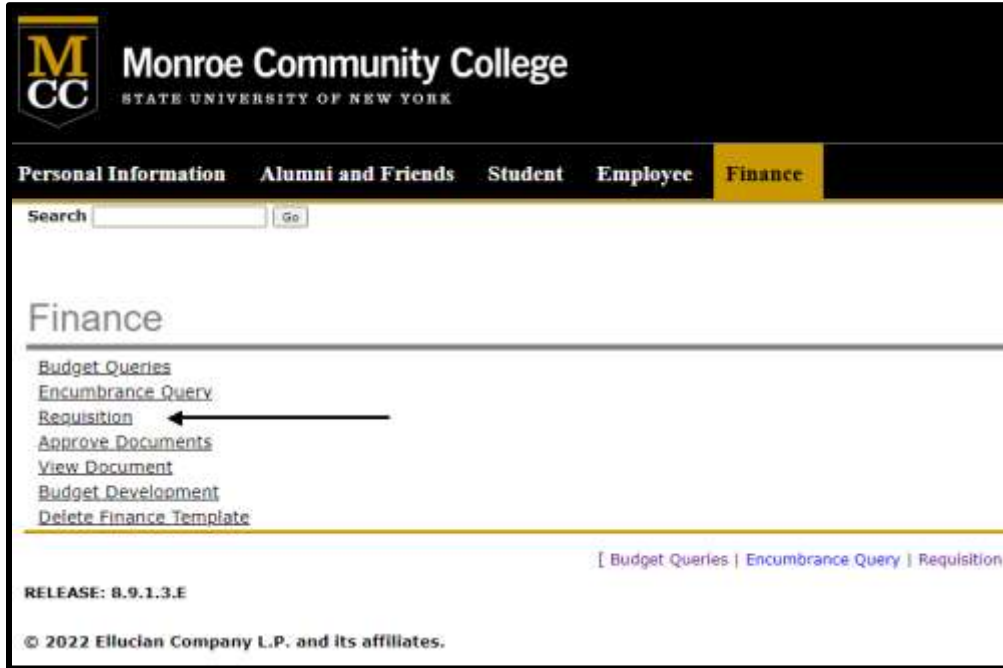




Creating a Purchase Requisition in FY-23

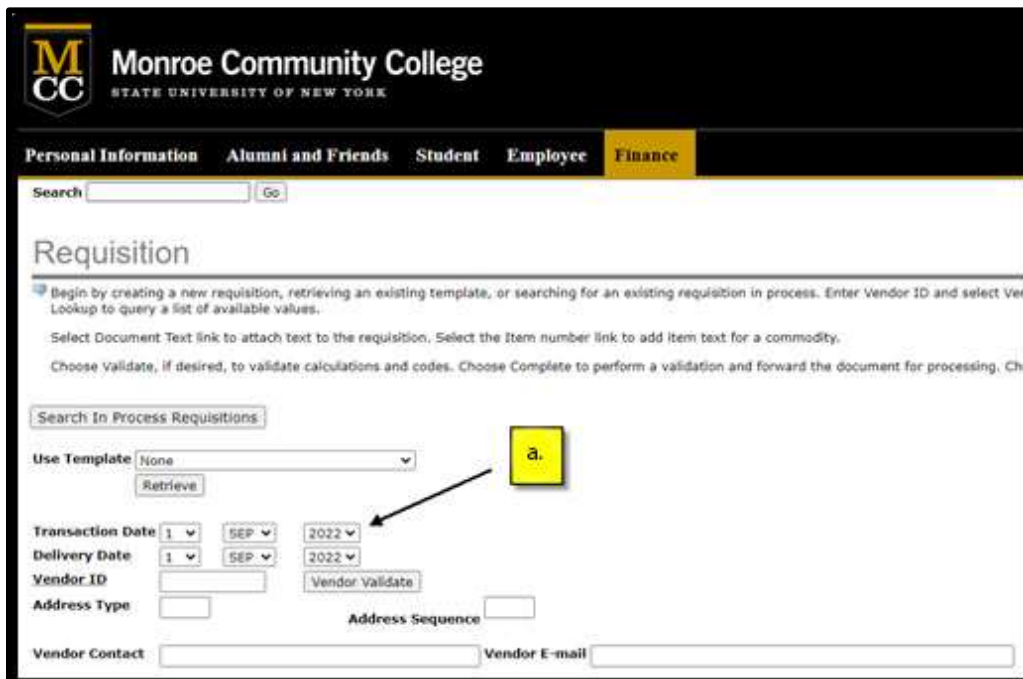
Steps to follow

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



2. Change the dates on the Requisition

- a. The 'transaction date' and 'delivery date' will always default to the current date. When creating a requisition in August for the FY-23 budget, the 'transaction date' and 'delivery date' must be changed to September 1, 2022 or later.



- b. 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, 2022 or later.

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Search [] Go

Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and select Vendor Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the 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. Choose Cancel to return to the requisition screen.

Search In Process Requisitions

Use Template: None [v]
Retrieve

Transaction Date: [1] [SEP] [2022]
Delivery Date: [1] [SEP] [2022]

Vendor ID: [] Vendor Validate []
Address Type: [] Address Sequence: []
Vendor Contact: [] Vendor E-mail: []
Requestor Name: PATRICK []
Requestor E-mail: pbrates@monroecc.edu []
Area Code: [] Extension: []
Requestor Phone: 585 2922000 2820 []
Requestor Fax: 585 2923846 []
Chart of Accounts: M [] Organization: 4104 []

Important Note

Failure to change the dates to September 1, 2022 or later, 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.