

**CREATING A PURCHASE REQUISITION  
IN FY-19**

Monroe Community College  
STATE UNIVERSITY OF NEW YORK

Personal Information Alumni and Friends Student Employee **Finance**

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### Finance

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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 new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and 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 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 validate and save the current contents without completion.

Use Template:

Transaction Date:    ← **1**

Delivery Date:

Vendor ID:

Address Type:  Address Sequence:

Vendor Contact:  Vendor E-mail:

**1** The ‘*transaction date*’ and ‘*delivery date*’ will always default to the current date. When creating a requisition in August for the FY-19 budget, the ‘*transaction date*’ and ‘*delivery date*’ must be changed to September 1, 2018 or later.

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Search In Process Requisitions

Use Template: None

Transaction Date: 1 SEP 2018

Delivery Date: 1 JAN 2018

Vendor ID:

Address Type:

Vendor Contact:

Requestor Name: PATRICK

Requestor E-mail: pbates@cc.edu

Area Code:

Requestor Phone: 585--

Requestor Fax: 585--

Chart of Accounts: M

Organization: 4104

**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, 2018 or later.

### IMPORTANT NOTE

Failure to change the dates to September 1, 2018 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.