HOW TO CHANGE A COMPLETED REQUISITION

The Banner finance system requires requisitions to be approved in the same fiscal month they are created. If the approval is not completed in the same month the requisition was entered, the approver will get an error message in Banner and cannot proceed with the approval process. When this happens, the transaction and delivery dates must be updated.

First, the approver must DISAPPROVE the requisition. Once the requisition is DISAPPROVED, the requisition is put into "incomplete" status. The requisition originator (the person who entered the requisition) must then go back into the requisition, and change the transaction and delivery dates to the current date. When this step is complete, the requisition originator will need to re-submit the requisition for the account manager's approval. Once it is approved, it will be forwarded either to the next level approver or directly to the Procurement Office.

The following is a step by step guide for changing the dates on a requisition. This same process can also be used for making other changes to a completed requisition that has not yet been approved.





STEP 4

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