# Purchasing Services

Business Office 651-638-6249 / purchasing@bethel.edu



#### Welcome to the Banner XE requisition system!

# First things first: Logging On

- To log on, go to mybethel, click on the yellow Tools and Resources box, and select Banner.
- Select Self-Service Banner, then click on the Finance tab.
- Click on My Finance XE.
   BETHEL | Self-Service Banner

Personal Information Employee Finance		
Search	RETURN TO MENU SITE MAP	HELP EXIT
Finance		
Budget Queries		
Requisition		
Approve Documents View Document		
Budget Development		
Training for Banner Finance Self Service Provides ITS training mater is for Banner Finance Self Service My Finance XE		
	[Budget Queries   Encumbrance Query   Requisition   Approve Documents   View Document   Budget Development   Training for Banner Finance Self Service   My Finance XE ]	

RELEASE: 8.8.3

This is your My Finance dashboard.

👪 ellucian.		٠	٩	Laura Jean Elliott
	My Finance			
	Hello Laura. Create, edit and approve transactions and view financial information for department / organization.			
	My Finance Query Create, view and share budget availability, encumbrance and payroll queries. My Requisitions Create and view draft, pending and completed requisitions and supporting documentation.			

#### Create a Requisition

• Click on My Requisitions. This brings you to your My Requisitions dashboard.



• Click on Create Requisition in the upper right hand corner.

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Ny Finance				
My Requisitions				Search Q Create Requisition
Requisition	Date	Amount	Vendor	Status
Draft Requisitions				
Pending Requisitions 1				
R0007260	11/09/2017	\$2.00	Hirshfield's	① Pending
Completed Requisitions 16				
R0007098	09/21/2017	\$18,762.50	BKBM Engineers	Completed
R0007188	10/04/2017	\$1,340.24	Graybar Electric Company Inc.	Assigned to Buyer
				View More

### 1 – Requestor Information

- Your name, the transaction date, your default Org, and your default Ship to Location are automatically populated.
- Enter delivery date Choose present date or any following.
- Public Comment Enter any notes that you want to be visible to the creator AND recipient of the purchase order. Examples include a quote number, "already ordered", "no action needed", or any other pertinent information.
- Private Comment Enter any information that you want only the purchasing department to see.
   Examples include "Do not email PO", "Already Ordered", "Standing PO", "New Vendor" with vendor information, special ship-to instructions, etc.
- Chart This self-populates to 1 Bethel University
- Attention to Most often this would be yourself, however if you are making a request for someone else, for example, your supervisor, you can enter their name here.

🛿 ellucian		😤 💽 Laura Jean Elliott
My Finance       My Requisitions       Create Requisition		
Create Requisition		
Requestor Information     Yendor Information     Add Item & Account	ting	Requisition Summary Save as draft
Requestor*	Chart*	
Elliott, Laura J, M5C#2384	1 Bethel University × v	
Transaction Date* Delivery Date*	Organization*	
11/10/2017	53105 Controller's Office × +	
Accounting Type : Document level Requisition Comments	Ship To Location *	Add details and click Next to build this summary view.
Public Comment	Attention To* Tax Group	
Enter comments for the requisition	Enter Name +	
	Ship To Location	
Private Comment Enter comments for the requisition	Adtention: Bethel University Purchasting/Bracelving 3900 dethel Onve Saint Paul MN 55112	
	Back Next	

# 2 - Vendor Information

- Vendor Enter the vendor number here, or, new with Banner XE, just begin typing the vendor name and click on the appropriate vendor from the dropdown list.
- Discount This would normally be left blank.
- Currency Leave as USD.
- Click Next or move to Add Item & Accounting

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My Finance • My Requisitions • R0007261			
R0007261		Attachments	Delete Requisition
Requestor Information     Vendor Information     Add Item & Accounting		Requisition Summary	Save as draft
Choose vendor for me		Requisition Number	R0007261
Vendor			
Choose Vendor x +			
Discount Currency			
Choose Discount x v USD US Dollars x v			
	Back Novt	View as 2005	
		Submit Requisition	

# 3 – Add Item & Accounting

• Enter the name and/or product number for what you are purchasing or choose one previously entered from the dropdown list.

# ellucian	🗱 🗵 Laura Jean Elliott 🕴
My Finance • My Requisitions • R0007261	Requisition R0007261 updated successfully
R0007261	Attachments 📋 Delete Requisition
Requestor Information     O Vendor Information     Add Item & Accounting	Requisition Summary Save as draft
Add Item(s)	Requisition Number R0007261
Choose Item	Apple Computer Inc. (270528) 2420 Ridgepoint Dr Austin TX 78754-5205
Back	View as PDF Submit Requisition

- Enter Unit of Measure If in doubt, use EA (Each).
- Enter Quantity
- Enter Unit Price
- Enter any Discount Amount, Additional Amount, or Tax Amount.
- Commodity Comments Enter any applicable public or private comments for the commodity.
- Click Save to save the item.

Finance   My Requisitions	e KUUU/261		
R0007261		🥝 Attachments 📑 De	lete Requisition
Requestor Information	Vendor Information	Add Item & Accounting     Requisition Summary	Save as draft
ommodity Description		Commodity Comments Requisition Number	R0007261
Macbook Gold 512 GB		Public Computer Inc. (270528) 2420 Midgepoint D* Audio TX 77546-700	
Jnit Of Measure*	Tax Group*		
EACH (EA)	hoose Tax Group		
Quantity*	Unit Price*		
1.00	1,599.0000	Private Comment	
Quantity) X (Unit Price)	USD 1,599.00	See Quote #8675309. Ship to 2 Pine Tree Dr.	
Discount Amount	Additional Amount		
0.00	0.00		
ax Amount			
0.00			
commodity Item Total	USD 1,599.00		
		Back Save View as PDF Submit Requisition	

• Repeat as necessary for additional items.

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My Finance   My Requisitions	<ul> <li>R0007261</li> </ul>		
R0007261		🔕 Attachments 🛛 🧃 🛙	Delete Requisition
Requestor Information	2 Vendor Information	Add Item & Accounting     Requisition Summary	Save as draft
Commodity Description		Commodity Comments Requisition Number	R0007261
BeatsX Earphones - Matte Gold		Public Comment         Apple Computer Inc. [270528]           See Quote #8675309         2420 Ridgeport Dr           Austim TX. 7575-5205         Austim TX. 7575-5205	
Unit Of Measure*	Tax Group*	Commodities (1)	
EACH (EA) × *	Choose Tax Group	Macbook Gold 512 GB	1,599.00
Quantity*	Unit Price*		
2.00	149.9500	Private Comment	
(Quantity) X (Unit Price)	USD 299.90	See Quote #8675309	
Discount Amount	Additional Amount		
0.00	0.00		
Tax Amount			
0.00			
		Grand Total - All Commodities	1,599.00
Commodity Item Total	USD 299.90	Grand Total - All Accounting	0.00
		Back         Save           View as PDF         Submit Requisition	

• Click Add Accounting and enter budget information. \* Indicates required field. Those without stars will be left blank in most cases. Leave Distribution at 100% unless using multiple budgets. Click Save.

# ellucian		🗱 🧕 Laura Jean Elliott
My Finance   My Requisitions   R0007261		
R0007261	Attack	hments 📋 Delete Requisition
Requestor Information     Q Vendor Information     Add Ite	n & Accounting Requisition Summary	Save as draft
Add Item(s)	Requisition Number	R0007261
Choose Item	Apple Computer Inc. (276528) 2420 Ridgepoint Dr Austin TX 75745-205	
Macbook Gold 512 GB 1,599.00	Commodities (2)	
Quantity 1.00 @ 1,599.0000 Discount 0.00	Macbook Gold 512 GB	1,599.00
Additional Charges 0.00 Tax 0.00	Quantity 1.00 @ 1,599.0000	Discount 0.00
BeatsX Earphones - Matte Gold 299.90	Additional Charges 0.00	Tax <b>0.00</b>
	BeatsX Earphones - Matte Gold	299.90
	Grand Total - All Commodities	1,898.90
	Grand Total - All Accounting	0.00
	Back Add Accounting Hew as PDF Submit Requisi	tion

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My Finance   My Requisitions   R0007261				
R0007261			🔇 Attachments 📋	Delete Requisition
Requestor Information     O Vendor Information     Add Item & Ac	counting		Requisition Summary	Save as draft
Requisition Number (R0007261) Currency USD			Requisition Number	R0007261
Chart* index	Distribution Amount*	Distribution Percent*	Apple Computer Inc. (270528) 2420 Ridgepoint Dr Austin TX 78754-5205	
Fund*	Discount Amount	Additional Amount	Commodities (2)	
110000 General Operating Fund	0.00	0.00	Macbook Gold 512 GB Quantity 1.00 @ 1,599.0000	1,599.00 Discount 0.00
			Additional Charges 0.00	1ax 0.00
S3105 Controller's Office	0.00		BeatsX Earphones - Matte Gold	299.90
Account*	Distribution Total	1.139.34	Accounting Total	0.00
7801 Equipment Purchase x 🛪			Commodity Total	1,898.90
Program* Activity	Remaining	759.56	Balanced	0%
60 Institutional Support	Split A	Accounting →		
Location Project				
Choose Location x v Choose Project x v				
			Grand Total - All Commodities	1,898.90
			Grand Total - All Accounting	0.00
		Back Save	View as PDF Submit Requisition	

• If using more than one budget number on a requisition, enter additional distribution amount in percentform and click Add Accounting. Enter budget information for remaining percentages.

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Finance  My Requisitions  R0007261			
20007261		Attachments	Delete Requisition
Requestor Information     Vendor Info	ormation 3 Add Item & Accounting	Requisition Summary	Save as draft
dd Item(s)		Requisition Number	R000726
Choose Item		Apple Computer Inc. (270528) 2420 Nidgepoint Dr Austin TX 7875-8205	
Commodities (2) Macbook Gold 512 GB	1,599.00	Commodities (2)	
Quantity 1.00 @ 1,599.0000	Discount 0.00	Macbook Gold 512 GB	1,599
Additional Charges 0.00	Tax 0.00	Quantity 1.00 @ 1,599.0000	Discount
BeatsX Earphones - Matte Gold	299.90	Additional Charges 0.00	Tax
Funding	60%	BeatsX Earphones - Matte Gold	29
	_	Funding	60
		Grand Total - All Commodities	1.89
		Grand Total - All Accounting	1,13
		Back Add Accounting View as PDF Submit Requisition	

• Funding will show as 100% in green box when complete.

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Finance   My Requisitions   R0007261		
R0007261	Attai	chments 📋 Delete Requisit
Requestor Information     O Vendor Information     S Add Item & Accounting	Requisition Summary	Save as dr
Choose vendor for me	Requisition Number	R000
andor Apple Computer Inc. (270528) x ,	Apple Computer Inc. (270528) 2420 Ridgepoint Dr Austin TX 78754-5205	
/endor information	Commodities (2)	
Apple Computer Inc. (270528)	Macbook Gold 512 GB	1,5
2420 Ridgepoint Dr Austin TX 78754-5205	Quantity 1.00 @ 1,599.0000	Discoun
	Additional Charges 0.00	Ta
scount conerky	BeatsX Earphones - Matte Gold	2
Choose Discount × v USD US Dollars × v	Funding	10
	Grand Total - All Commodities	1,8
	Grand Total - All Accounting	1,8
	Back Next View as PDF Submit Require	sition

# **Review and Submit**

- View the Requisition Summary section on the right side of your screen.
- Click View as PDF if you would like to see what your requisition will look like.

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My Finance   My Requisitions   R0007261			
R0007261		Ø Attachm	ents 📋 Delete Requisition
Requestor Information     Vendor Information	3 Add Item & Accounting	Requisition Summary	Save as draft
Add Item(s)		Requisition Number	R0007261
Choose Item	•	Apple Computer Inc. (270528) 2420 Ridgepoint Dr Austin TX 78754-5205	
Commodities (2)	1500.00	Commodities (2)	
Quantity 1.00 @ 1,599.0000	Discount 0.00	Macbook Gold 512 GB	1.599.00
Additional Charges 0.00	Tax 0.00	Quantity 1.00 @ 1,599.0000	Discount 0.00
BeatsX Earphones - Matte Gold	299.90	Additional Charges 0.00	Tax 0.00
Funding	100%	BeatsX Earphones - Matte Gold	299.90
	_	Funding	100%
		Grand Total - All Commodities	1,898.90
		Grand Total - All Accounting	1,898.90
		Back View as P <sup>2</sup> mit Requisitio	p

		PURCHA (Non-negotiable; n	SE REQUISITION ot a valid Purcha	l ase Order)			
Requestor		Elliott, Laura J, MSC#2384	Requisition #		R0007261		
Phone		• Ext	Transaction C	Date	11/10/2017	5	
Email		l-elliott@bethel.edu	Delivery Date		11/10/2017	3	
Organization		Controller's Office (53105)	Status		therd		
Accounting Type	Туре	Document Level	Currency		USD		
Ship To		18	Vendor		Apple Com	puter Inc.(2705	28)
Address		Bethel University	Address		2420 Ridge	point Dr	
		Purchasing/Receiving					
		3900 Bethel Drive					
		Saint Paul MN 55112			Austin TX	78754-5205	
Attention To		Laura Elliott 651-6386249 Ext	Phone		• Fax •		
Requisition Comments	Comments						
Commodities	65						
1 Macbook tem Text	Description Macbook Gold 512 GB Item Text:	2 G8	U/M EA	quantity 1.00	1,599.0000	0.00	10001
2 See Quoti 2 BeatsX Ea Item Text: See Quoti	See Quote #8675309 BeatsX Earphones - M Item Text: See Quote #8675309	309 i - Matte Gold 309	EA	2.00	149.9500	00.0	299.90
		Grand Total - All Commodit	ies				1,898.90
Accounting Distribut	Distributions						
Sequence #	ience # Chart	hart-Index-Fund-Orgn-Acct-Prog-Actv	x-Fund-Orgn-Acct-Prog-Actv-Locn-Proj Distribu		ion Percent	Distribu	tion Total
1 2	1 111 2 111	- 110000- 53105- 7801- 60 - 110000- 11005- 7801- 60			60.0000 40.0000		1,139.34 759.56
		Grand Total - All Account	ani				1,898.90

• Click Save as draft to save for later, or click Submit Requisition to submit your requisition now.

07261		Attachma	Dolote Pequicition
07261		Attachme	Delete Requisition
Requestor Information 🛛 🔕 Vendor I	nformation 3 Add Item & Accounting	Requisition Summary	Save as draft
tem(s)		Requisition Number	R0007261
oose Item	×	Apple Computer Inc. (270528) 2420 Ridgepoint Dr Ausbi TX 7875-45265	
facbook Gold 512 GB	1.599.00	Commodities (2)	
Quantity 1.00 @ 1,599.0000	Discount 0.00	Macbook Gold 512 GB	1,599.00
dditional Charges 0.00	Tax 0.00	Quantity 1.00 @ 1,599.0000	Discount 0.00
eatsX Earphones - Matte Gold	299.90	Additional Charges 0.00	Tax <b>0.0</b> 0
Funding	100%	BeatsX Earphones - Matte Gold	299.90
		Funding	100%
		Grand Total - All Commodities	1,898.9

• If you do not wish to submit the requisition now or in the future, click Delete Requisition in the upper right hand corner.

### Approval

• The requisition will now appear under Pending Requisitions on your My Requisitions Dashboard, where it will stay until it is approved by each level of approver.

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						*		Euclid Jean e	linote	L
My	Finance					Requisition R0	007261	completed su	ccessful	Ŋ
	My Requisitions				Search	Q		Create Requi	isition	
	Requisition	Date	Amount	Vendor		Status				
	Draft Requisitions 0									
	Pending Requisitions 2									
	R0007261	11/10/2017	\$1,898.90	Apple Computer Inc.		(i) Pendin	g			
	R0007260	11/09/2017	\$2.00	Hirshfield's		(i) Pendin	g			
	Completed Requisitions 16									
	R0007098	09/21/2017	\$18,762.50	BKBM Engineers		Comple	eted			
	R0007188	10/04/2017	\$1,340.24	Graybar Electric Company Inc.		(i) Assignment	ed to Bu	yer		
								View	r More	

• Once approved, your requisition gets sent to Purchasing Services for creation of the purchase order. When the purchase order is complete, you will receive the department copy and your vendor will receive an email copy if their email address is in Banner and you have not specified, "Do not email PO." If we do not have the vendor email address or if you have specified "Do not email" you will also receive the vendor copy of the purchase order. At that point, it is your responsibility to get the purchase order to the vendor if required. Clicking on the "i" next to the requisition details will show you the approvers for your requisition.