

Purchasing Services

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



Banner XE Requisition Guide

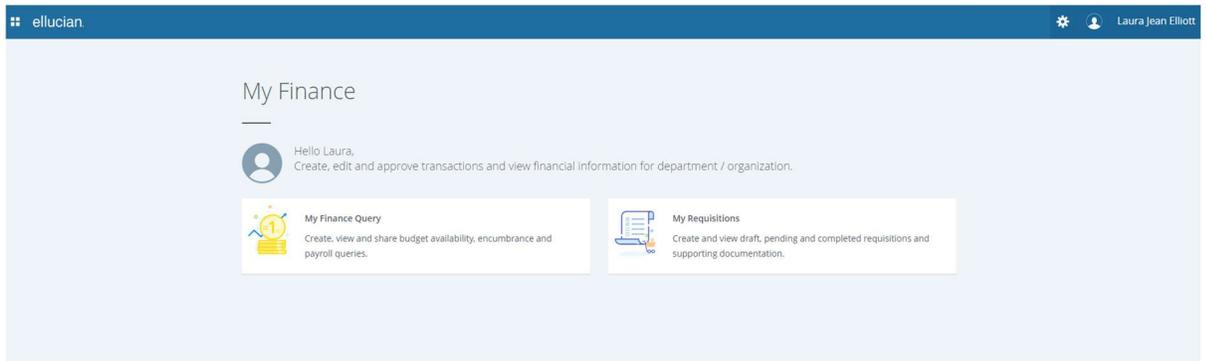
Welcome to the Banner XE requisition system!

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.

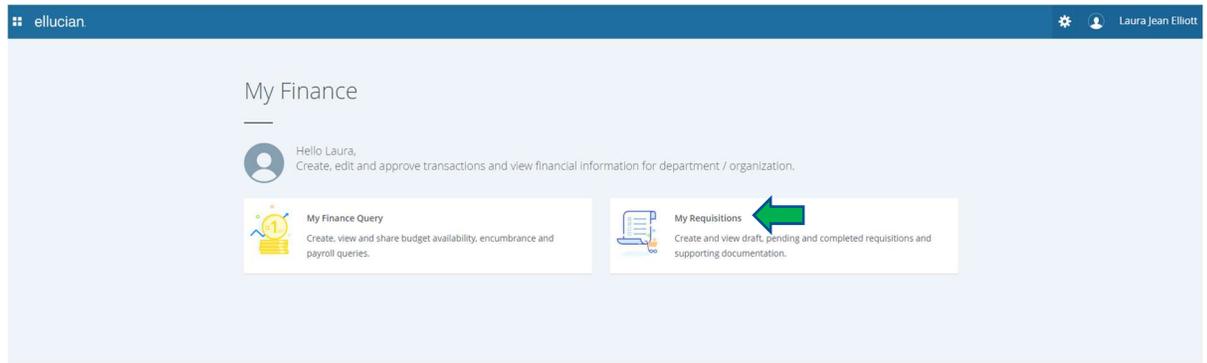


- This is your My Finance dashboard.

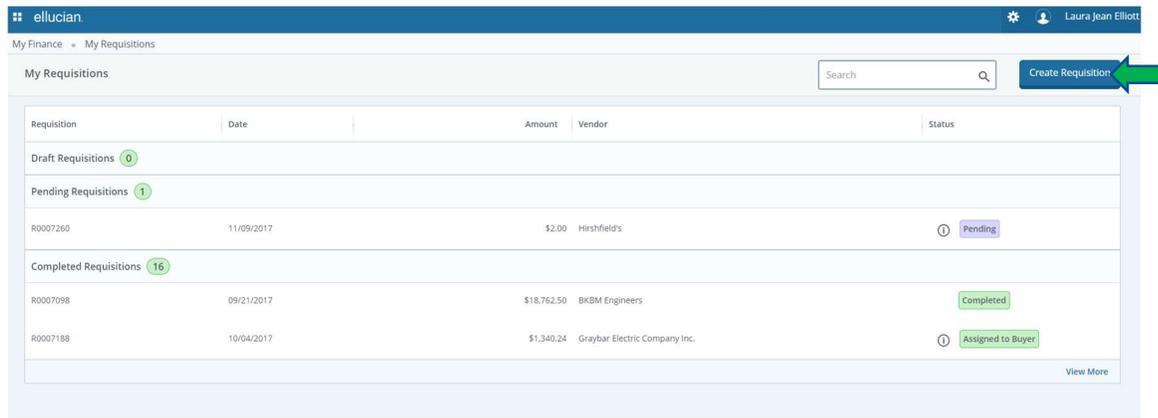


Create a Requisition

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



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



1 – Requestor Information

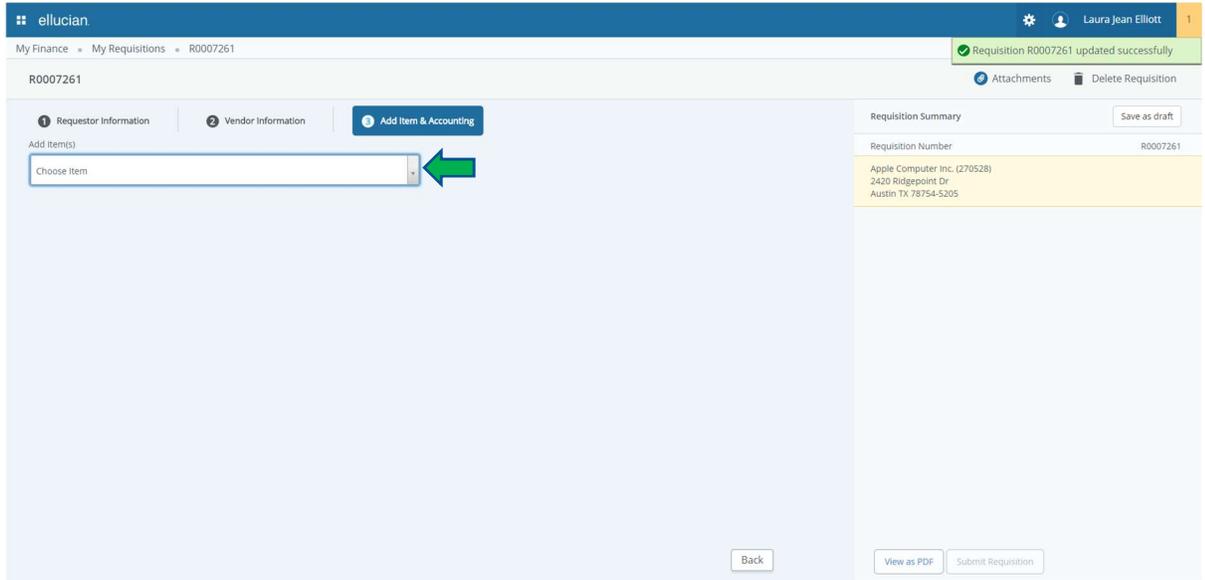
- Your name, the transaction date, your default Org, and your default Ship to Location are automatically populated.
- Enter delivery date – Choose present date or any following.
- Public Comment – Enter any notes that you want to be visible to the creator AND recipient of the purchase order. Examples 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.

2 – Vendor Information

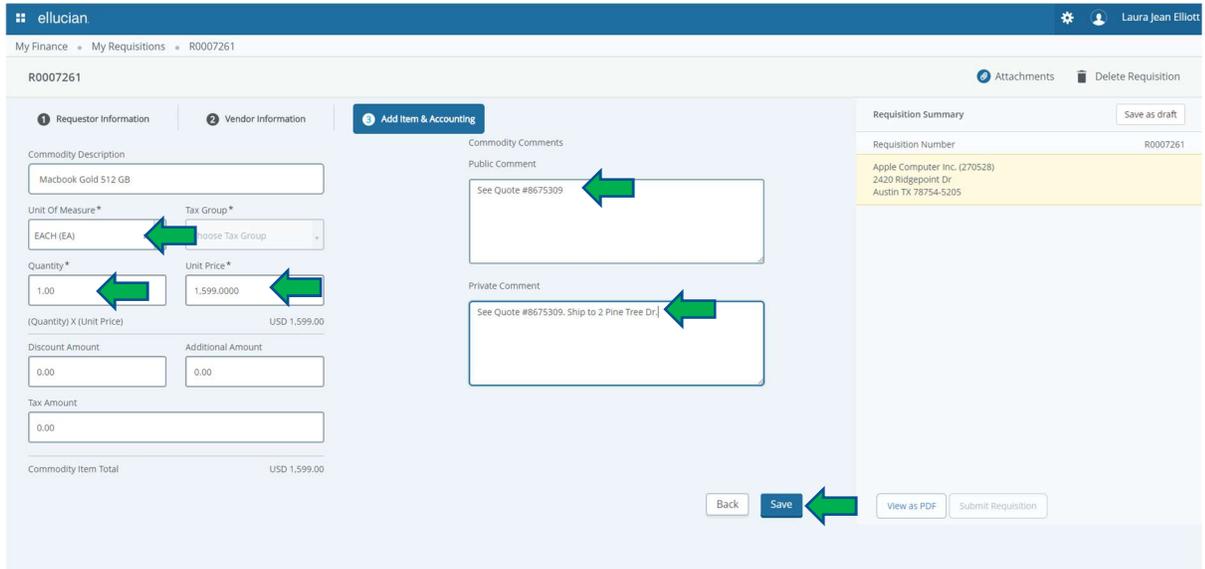
- Vendor – Enter the vendor number here, or, new with Banner XE, just begin typing the vendor name and click on the appropriate vendor from the dropdown list.
- Discount – This would normally be left blank.
- Currency – Leave as USD.
- Click Next or move to Add Item & Accounting

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.



- 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.



- Repeat as necessary for additional items.

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My Finance > My Requisitions > R0007261

R0007261

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Commodity Description
BeatsX Earphones - Matte Gold

Unit Of Measure*
EACH (EA)

Quantity*
2.00

(Quantity) X (Unit Price)
USD 299.90

Discount Amount
0.00

Tax Amount
0.00

Commodity Item Total
USD 299.90

Tax Group*
Choose Tax Group

Unit Price*
149.9500

Additional Amount
0.00

Commodity Comments
Public Comment
See Quote #8675309

Private Comment
See Quote #8675309

Back Save

Requisition Summary

Requisition Number
R0007261

Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (1)

Macbook Gold 512 GB	1,599.00
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Grand Total - All Commodities
1,599.00

Grand Total - All Accounting
0.00

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.

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R0007261

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (2)

Macbook Gold 512 GB	1,599.00	
Quantity 1.00 @ 1,599.00000		Discount 0.00
Additional Charges 0.00		Tax 0.00
BeatsX Earphones - Matte Gold	299.90	

Back Add Accounting View as PDF Submit Requisition

Requisition Summary

Requisition Number
R0007261

Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (2)

Macbook Gold 512 GB	1,599.00
Quantity 1.00 @ 1,599.00000	Discount 0.00
Additional Charges 0.00	Tax 0.00
BeatsX Earphones - Matte Gold	299.90

Grand Total - All Commodities
1,898.90

Grand Total - All Accounting
0.00

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R0007261 Attachments Delete Requisition

1 Requirer Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number (R0007261) Currency USD

Chart* 1 Bethel University Index Use Index

Fund* 110000 General Operating Fund

Organization* 53105 Controller's Office

Account* 7801 Equipment Purchase

Program* 60 Institutional Support Activity Choose Activity

Location Choose Location Project Choose Project

Distribution Amount* 1,139.34 Distribution Percent* 60.00000000

Discount Amount 0.00 Additional Amount 0.00

Tax Amount 0.00

Distribution Total 1,139.34

Remaining 759.56

Split Accounting

Back Save View as PDF Submit Requisition

Requisition Summary Save as draft

Requisition Number R0007261

Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (2)

Macbook Gold 512 GB	1,599.00	
Quantity 1.00 @ 1,599.00000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
BeatsX Earphones - Matte Gold	299.90	
Accounting Total	0.00	
Commodity Total	1,898.90	
Balanced		0%

Grand Total - All Commodities 1,898.90

Grand Total - All Accounting 0.00

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

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R0007261 Attachments Delete Requisition

1 Requirer Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s) Choose Item

Commodities (2)

Macbook Gold 512 GB	1,599.00	
Quantity 1.00 @ 1,599.00000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
BeatsX Earphones - Matte Gold	299.90	
Funding		60%

Back Add Accounting View as PDF Submit Requisition

Requisition Summary Save as draft

Requisition Number R0007261

Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (2)

Macbook Gold 512 GB	1,599.00	
Quantity 1.00 @ 1,599.00000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
BeatsX Earphones - Matte Gold	299.90	
Funding		60%

Grand Total - All Commodities 1,898.90

Grand Total - All Accounting 1,139.34

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

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My Finance > My Requisitions > R0007261

R0007261

Requestor Information | **Vendor Information** | Add Item & Accounting

Choose vendor for me

Vendor
Apple Computer Inc. (270528)

Vendor Information
Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Discount: Choose Discount | Currency: USD US Dollars

Attachments | Delete Requisition

Requisition Summary

Requisition Number: R0007261

Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (2)

Macbook Gold 512 GB	1,599.00
Quantity 1.00 @ 1,599.00000	Discount 0.00
Additional Charges 0.00	Tax 0.00
BeatsX Earphones - Matte Gold	299.90
Funding	100%

Grand Total - All Commodities: 1,898.90
Grand Total - All Accounting: 1,898.90

Back | **Next** | View as PDF | Submit Requisition

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

Requestor Information | Vendor Information | **Add Item & Accounting**

Add Items)
Choose Item

Commodities (2)

Macbook Gold 512 GB	1,599.00
Quantity 1.00 @ 1,599.00000	Discount 0.00
Additional Charges 0.00	Tax 0.00
BeatsX Earphones - Matte Gold	299.90
Funding	100%

Attachments | Delete Requisition

Requisition Summary

Requisition Number: R0007261

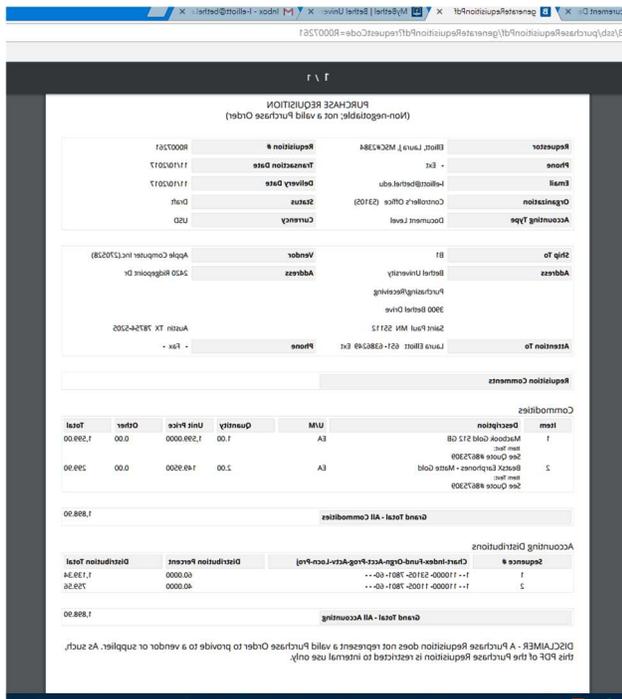
Apple Computer Inc. (270528)
2420 Ridgpoint Dr
Austin TX 78754-5205

Commodities (2)

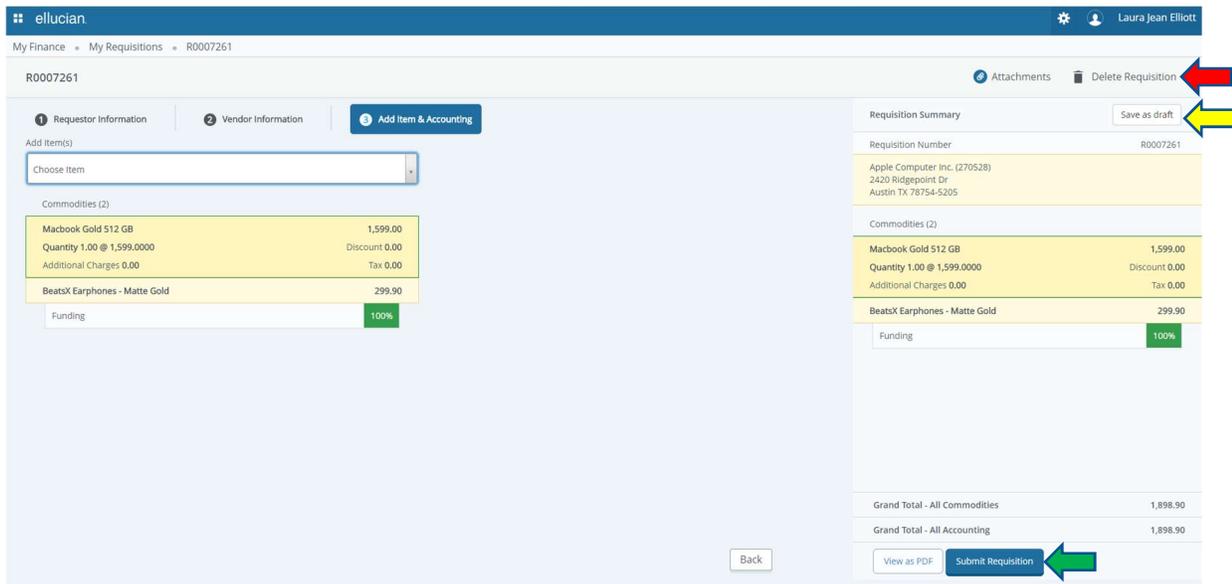
Macbook Gold 512 GB	1,599.00
Quantity 1.00 @ 1,599.00000	Discount 0.00
Additional Charges 0.00	Tax 0.00
BeatsX Earphones - Matte Gold	299.90
Funding	100%

Grand Total - All Commodities: 1,898.90
Grand Total - All Accounting: 1,898.90

Back | View as PDF | **Submit Requisition**



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



- 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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My Finance • My Requisitions Requisition R0007261 completed successfully

My Requisitions Search Create Requisition

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 0				
Pending Requisitions 2				
R0007261	11/10/2017	\$1,898.90	Apple Computer Inc.	ⓘ Pending
R0007260	11/09/2017	\$2.00	Hirshfield's	ⓘ 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](#)

- 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.