

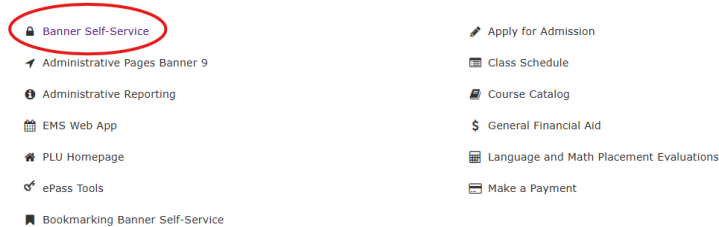
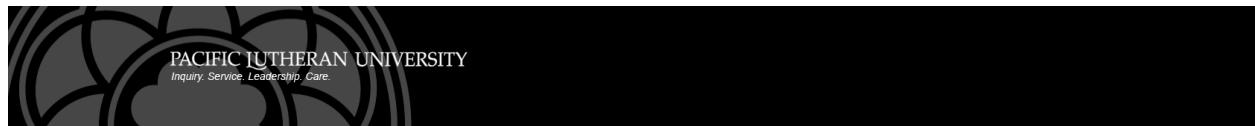
Buyer Process

Purchase Order with a NEW Vendor

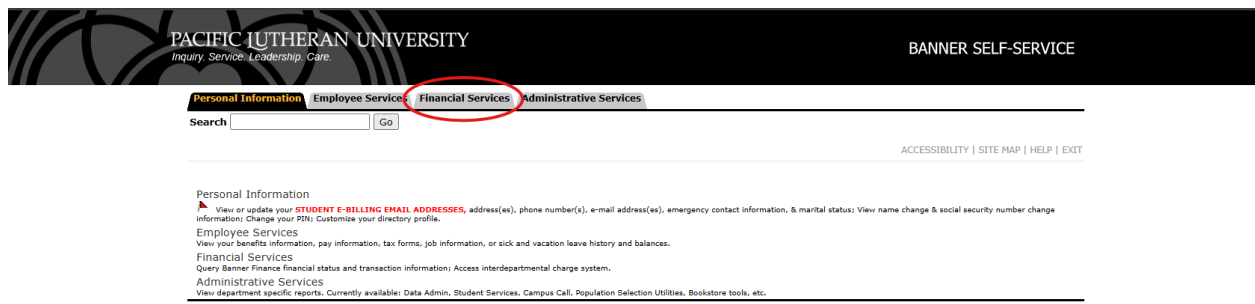
- Please email Orlanda (ocastillo@plu.edu) the vendor information along with a current w9 so she can add them to the system.
- Please do this before you start the requisition process.

Purchase Order - Requisition Form

- Open Banner
- Click Banner Self-Service



- Click the Financial Services Tab



- Click Finance Dashboard

[Insert Photo Here]

- You will be taken to the Banner Self-Service Dashboard. Navigate to the 'Financial Services' tab

PLU Banner Self-Service

[SITE MAP](#)

Personal Information

Employee Services

Financial Services

Administrative Services

Personal Information



View/Update Personal Information

View and update biographical information, addresses, telephone numbers, email addresses, and emergency contacts.



Name Change Information



Social Security Number Change Information



Notifications and Preferences

- Once under the 'Financial Services' tab click on the 'Finance Self-Service Dashboard'

Personal Information

Employee Services

Financial Services

Administrative Services

[SITE MAP](#)

Finance Self-Service



Summary - PLU Financial Status Queries



PLU Inter-Departmental Charges



Summary - PLU Fee Assessment Collector



Finance Self-Service Dashboard

Finance Self-Service Banner 9

- Once in your Finance Self-Service Dashboard, click 'My Requisitions'

My Finance



Hello Keri,

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 Journals

Create and view draft, pending and completed journals and supporting documentation.



My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



Purchase Orders

Create purchase orders or purchase orders in process.

- Here you will see all your requisition drafts, those pending approval, and those completed. At this step, you will click 'Create a Requisition' in the top right corner.

My Finance • My Requisitions

My Requisitions

Search Requisition  **Create Requisition**

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 0				
Pending Requisitions 0				
Completed Requisitions 0				

- Here you will fill in all the information required including:
 - Your Name
 - Transaction Date [Today's Date]
 - Delivery Date [When you need the PO by] - Procurement requests at least 3 days to process your PO
 - Your Email Address
 - Chart (leave as is)
 - Organization: Your Department's Org Number (Ex: 6310 - Administrative Services Office)
 - Ship to Location: Click No.1 'Shipping & Receiving - Lower Campus'
 - Attention To (leave as is)
 - Tax Group: Type in 10.2 and click '102 State Sales/Use Tax 10.2%'
 - Choose Accounting Type - Always use 'Document Level Accounting' unless you are splitting ONE item between multiple FOAPS then you would use "Commodity Level Accounting"

My Finance • My Requisitions • Create Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting Requisition Summary [Save as draft](#)

Requestor *
Walker, Keri

Transaction Date * Delivery Date *
03/19/2026 03/22/2026

Requestor Email
keri.walker@plu.edu

Choose Accounting Type
☒ Document Level Accounting
☐ Commodity Level Accounting

Chart *
P Pacific Lutheran University

Organization *
6310 Administrative Services ...

Ship To Location *
1 Shipping & Receiving-Lower ...

Attention To * Tax Group
Shipping & Rec 101 State Sa...

Ship To Location

Add details and click Next to build this summary view.

- Scroll down and describe your purchase/service in 'Public Comment'
 - Any questions for Procurement, leave in 'Private Comment'
- Click 'Next'

My Finance • My Requisitions • Create Requisition

☒ Document Level Accounting
 ☐ Commodity Level Accounting

Shipping & Rec 101 State Sa... ▼

Requisition Comments

Public Comment

Description of Product/Service - What you are buying and why.

Private Comment

Any questions or comments for Procurement

Ship To Location

Attention: Shipping & Receiving-
Lower Campus
Pacific Lutheran University
1010 South 122nd
Tacoma WA 98447

Back Next Submit Requisition

- The next tab is 'Vendor Information'
 - Note your requisition numbers (circled in red)
 - Always leave the 'Choose Vendor for me' box UNchecked

R0600024 Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

☐ Choose vendor for me

Vendor

Choose Vendor ▼

Discount Choose Discount ▼ Currency Choose Currency ▼

Requisition Summary Save as draft

Requisition Number R0600024

Back Next View as PDF Submit Requisition

- Type in your Vendor
 - If your Vendor is not popping up, determine if they have been used by the university before.
 - If they have, please email Procurement.
 - If they have not, please go back to step one for Purchase Orders for New Vendors and complete that step.
 - Fill out the Vendor's Email
 - Leave the Discount portion at '1 Net 30'
 - Select USD for Currency
 - Click 'Next'

My Finance • My Requisitions • R0600024

Vendor

Cummins Northwest LLC (204117920) x v

Vendor Information

Cummins Northwest LLC (204117920)
Unit 50
PO Box 4800
Portland OR 97208

Vendor Email

cumminsnw@cummins.com x v

Discount

1 Net 30 x v

Currency

USD United States ... x v

Back Next View as PDF Submit Requisition

- Now you are in the 'Add Items and Accounting' Tab
 - Here you will start adding the items you will be purchasing.
 - Click 'Choose Item'

My Finance • My Requisitions • R0600024

R0600024

✓ Draft Requisition R0600024 updated successfully

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Requisition Summary Save as draft

Requisition Number R0600024

Cummins Northwest LLC (204117920)
Unit 50
Portland OR 97208

Back View as PDF Submit Requisition

- Type in your item type into 'Choose Item'
 - Use your best judgement here
- Enter the Unit of Measure (EA, BX, CS, etc)
- Tax Group: Double check it is '102 State Sales/Use Tax 10.2%'
- Enter the 'Quantity' and 'Unit Price'
 - The tax should autopopulate for you
- Fill in 'Discount Amount' and 'Additional Amount' as necessary.
- Add the product/service description in the 'Public Comment' section

My Finance • My Requisitions • R0600024

1 Requestor Information
2 Vendor Information
3 Add Item & Accounting

Item Code (7153)

Equipment Repair & Maintenance

Unit Of Measure * Each (EA) x v

Tax Group * 101 State S... v

Quantity * 1.00

Unit Price * 7,548.5400

(Quantity) X (Unit Price) USD 7,548.54

Discount Amount 0.00

Additional Amount 0.00

Commodity Comments

Public Comment

Generator Maintenance
This is a three year service contract for inspection, full service and load bank testing.

Private Comment

Enter comments for the commodity item

Requisition Summary

Requisition Number R0600024

Cummins Northwest LLC (204117920)
Unit 50
Portland OR 97208

- Scroll down and click 'Save'

My Finance • My Requisitions • R0600024

1.00

7,548.5400

(Quantity) X (Unit Price) USD 7,548.54

Discount Amount 0.00

Additional Amount 0.00

Tax Amount 762.40

Commodity Item Total USD 8,310.94

Private Comment

Enter comments for the commodity item

Back

Save

View as PDF

Submit Requisition

- Once you click 'Save', this screen will pop up.
 - Here is where you can add additional items.
 - Once you have finished adding all your items, you will click 'Add Accounting'

My Finance • My Requisitions • R0600024

✓ Equipment Repair & Maintenance added to requisition R0600024

R0600024

1 Requestor Information
2 Vendor Information
3 Add Item & Accounting

Add Item(s)

Choose Item x v

Commodities (1)

Equipment Repair & Maintenance (7153)	8,310.94
Quantity 1.00 @ 7,548.5400	Discount 0.00
Additional Charges 0.00	Tax 762.40

Requisition Summary

Requisition Number R0600024

Commodities (1)

Equipment Repair & Maintenance (7153)	8,310.94
Quantity 1.00 @ 7,548.5400	Discount 0.00
Additional Charges 0.00	Tax 762.40
Grand Total - All Commodities	8,310.94
Grand Total - All Accounting	0.00

Back

Add Accounting

View as PDF

Submit Requisition

- Here is where you will add the FOAP

- Leave 'Chart' as is
- Go ahead and fill out all of the required fields
 - Fund
 - Organization
 - Account
 - Program
- 'Distribution Amount' and 'Distribution Percent' should AutoFill for you
- The remaining fillable sections without red asterisks can be left alone.

My Finance • My Requisitions • R0600024

Requisition Number (R0600024) Currency USD

Chart * P Pacific ... x v	Index Choose I... x v	Distribution Amount * 7,548.54	Distribution Percent * 100.00000000
Fund * 110001 Current Funds Unrestric... x v		Discount Amount 0.00	Additional Amount 0.00
Organization * 7010 Plant Building Maintenanc... x v		Tax Amount 762.40	
Account * 7123 Other Outside Services x v		Distribution Total 8,310.94	
Program * 71 Oper... x v	Activity Choose ... x v	Remaining 0.00	

Requisition Number R0600024	
Cummins Northwest LLC (204117920) Unit 50 Portland OR 97208	
Commodities (1)	
Equipment Repair & Maintenance (7153) Quantity 1.00 @ 7,548.5400	8,310.94 Discount 0.00
Additional Charges 0.00	Tax 762.40
Accounting Total	0.00
Commodity Total	8,310.94
Balanced	0%

- Scroll down, review the total is accurate and then click 'Save'

My Finance • My Requisitions • R0600024

110001 Current Funds Unrestric... x v	Discount Amount 0.00	Additional Amount 0.00
Organization * 7010 Plant Building Maintenanc... x v	Tax Amount 762.40	
Account * 7123 Other Outside Services x v	Distribution Total 8,310.94	
Program * 71 Oper... x v	Activity Choose ... x v	Remaining 0.00
Location Choose ... x v	Project Choose ... x v	

Equipment Repair & Maintenance (7153) Quantity 1.00 @ 7,548.5400	8,310.94 Discount 0.00
Additional Charges 0.00	Tax 762.40
Accounting Total	0.00
Commodity Total	8,310.94
Balanced	0%
Grand Total - All Commodities	8,310.94
Grand Total - All Accounting	0.00

[Back](#)
[Save](#)
[View as PDF](#)
[Submit Requisition](#)

- Review all the information and click 'Submit Requisition'

My Finance • My Requisitions • R0600024

Accounting added to requisition R0600024

R0600024 [Delete Requisition](#)

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Commodities (1)

Equipment Repair & Maintenance (7153)	8,310.94
Quantity 1.00 @ 7,548.5400	Discount 0.00
Additional Charges 0.00	Tax 762.40
Funding	100%

Requisition Summary [Save as draft](#)

Requisition Number R0600024

Equipment Repair & Maintenance (7153)	8,310.94
Quantity 1.00 @ 7,548.5400	Discount 0.00
Additional Charges 0.00	Tax 762.40
Funding	100%
Grand Total - All Commodities	8,310.94
Grand Total - All Accounting	8,310.94

[Back](#) [View as PDF](#) [Submit Requisition](#)

- Here is what your screen should look like after you submit your requisition.

My Finance • My Requisitions

Requisition R0600024 completed successfully

My Requisitions [Create Requisition](#)

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 0				
Pending Requisitions 1				
R0600024	03/19/2026	Cummins Northwest LLC	\$8,310.94	In Approval ⓘ
Completed Requisitions 0				

- Once approved and processed, we will send you the executed PO. Once received, you are responsible for sending the PO to the vendor.
- **IMPORTANT REMINDER - Once you receive your first invoice from the Vendor for this purchase, you need to add the PO number to the invoice before sending it to Accounts Payable for processing. This is extremely important to avoid messing up the budget.**

How to Delete Draft Requisitions

1. Locate the Draft: Navigate to the "My Requisitions" page.
2. Open Requisition: Click on the draft requisition you wish to delete.
3. Delete: Click the Delete Requisition button (usually located in the top right).
4. Confirm: A prompt will appear asking to confirm; select "Yes" to remove the draft.

How to Recall a Requisition

1. Access My Requisitions: Go to the my requisitions dashboard in Banner Finance Self-Service.
2. Locate the Requisition: Find the requisition in the Pending queue.
3. Open and Recall: Click on the requisition to open it, then click the Recall My Requisition button in the upper right corner.
4. Confirm: Click "Yes" on the prompt to move the requisition back to the Drafts section for editing.

Notes:

- **Restriction:** Requisitions can only be recalled if they have not yet been approved or converted into a Purchase Order (PO).
- **Approval Status:** If the requisition is already approved, you may need to contact your purchasing department to have it returned.
- **Requisition Number:** The original requisition number remains the same after it is recalled