

How to Create & Approve Purchase Orders

ExpressLane 9 ( Banner Self-Service)

# How to create a PO in ExpressLane 9 – Banner Help Services - 1

1. Go to ExpressLane 9
2. Login to Lane CAS
3. Enter your L Number and network password, Select Login
4. Click Purchase Orders

**My Finance**

Hello [Redacted]  
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.
- Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- Purchase Orders**  
Create purchase orders or purchase orders in process.
- View Document**  
View draft, pending and completed documents with related information and approval history.

# How to create PO in ExpressLane 9 – Banner Help Services-2

1. Select Transaction ,  
Purchase , Delivery Date
2. Buyer Code is always LCC
3. Select Vendor ID and Click  
Validate , confirm Vendor  
information
4. Check Requestor Detail
5. If printing or emailing in  
Fpapord, add the requestor  
email you would like it to be  
emailed to
6. The fields Attention to and  
comments will also print on the  
PO in Fpapord
5. Check Account and  
Organization Details

The screenshot displays the ExpressLane 9 PO creation form, organized into several sections:

- Dates:** Transaction Date (11/28/2023), Delivery Date (11/28/2023), and Purchase Order Date (11/28/2023).
- Vendor Details:** Vendor ID (LCC), Vendor Name (ConvergeOne Inc), Vendor Contact, Address Type (BU), Address Sequence (1), Vendor Address (NW), and Vendor Email.
- Requestor Details:** Requestor Name, Requestor Phone (Country: USA, Area: 3233502660, Extension), Requestor Email (@lanec.edu), and Requestor Fax (Country: USA, Area, Phone Number, Extension).
- Account & Organization Details:** Chart of Accounts (L), Currency Code (USD), Ship Code (LCC), Organization (280001), and Discount Code (Select).
- Comments:** A text area for comments with a maximum of 30 characters.

# How to create PO in ExpressLane 9 – Banner Help Services-3

1. Select Purchase Order Commodities
2. Enter U/M , Quantity, Unit Price
3. Validate the Commodity
4. Add additional lines as needed.

## Purchase Order Commodities

Item	Commodity Code	Commodity Description	U/M *	Quantity *	Unit Price *	Discount Amount	Additional Amount	Add Text
1	<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[+ Add Commodity](#)

[Commodity Validate](#)



# How to create PO in ExpressLane 9 – Banner Help Services-4

1. Enter Purchase Order Accounting
2. Choose either Dollar or Percent
3. Chart for Lane Community College is always L
3. Enter Fund , Organization, Account , Program ( FOAP)
4. Enter Accounting ( % or Dollar Value applicable to FOAP)
5. Validate and Complete

Purchase Order Accounting

Dollars  Percents

Sequence	Chart *	Index	Fund	Organization	Account	Program	Activity	Location	Accounting *
1	Select	Select	Select	Select	Select	Select	Select	Select	

+ Add Accounting Sequence

Save As Template

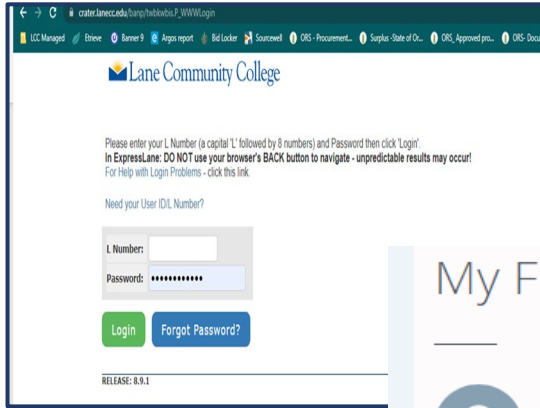
Share Template

Validate Complete Save in Process

# 4.c. Purchase Order Approval

1. Purchase Orders will be reviewed and approved through “ExpressLane (Banner Self-Service) ” by the Workflow Approvers.
2. The following information will be verified:
  - Order type (regular vs standing)
  - Vendor name
  - Contract agreement if any
  - Purchase description and cost
  - Applied FOAP (fund, organization, account, & program)
2. After the PO is approved, the requestor needs to submit the documentation to the vendor. Always attach contracts/quotes.
3. Always confirm vendor acknowledgement and delivery date .

# Steps for PO approval in Express Lane



## My Finance

Hello [redacted],  
Create, edit and approve transactions and view financial information.

- 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.
- Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.

**Information:** The radio buttons related to next approver apply when a User ID is present.

User ID	Document Number	<input type="button" value="Submit"/>
<input type="text" value="AUNGL"/>	<input type="text"/>	

User ID is next approver  All documents User may approve

# Check points for Approver

## PURCHASE ORDER

<b>Requestor</b>	T [Redacted]	<b>Purchase Order Number</b>	P0084997
<b>Phone</b>	Ext	<b>Transaction Date</b>	09/28/2023
<b>Email</b>		<b>Delivery Date</b>	10/05/2023
<b>Organization</b>	Finance and Administration (201001)	<b>Status</b>	Pending
<b>Accounting Type</b>	Document Level	<b>Currency</b>	USD
<b>Type</b>	Regular	<b>Matching</b>	Not Required

<b>Ship To</b>	LCC	<b>Vendor</b>	[Redacted] It Specialties Inc. ( [Redacted] )
<b>Address</b>	Lane Community College 4000 E 30th Ave  Eugene OR 97405-0640	<b>Address</b>	128 [Redacted] rn Ave.  San Antonio TX 78249-2230
<b>Attention To</b>	L00 [Redacted]		

**Purchase Order Comments** [Redacted]

### Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Services(S1)	EA	1.00	1,110.91	0.00	1,110.91
<b>Total Commodities</b>						1,110.91

### Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	L - 822961- 510205- 617600- 510000- -	Yes	No	No	100.00	1,110.91
<b>Total Accounting Distributions</b>						1,110.91

DISCLAIMER - This Purchase Order PDF is restricted to internal use only.

### Notes :

- There is no email notification for the approver
- As an approver, you are responsible for checking ExpressLane perpetually



# The Role of the Approver

Budget Managers and higher-level personnel are among those who may serve as Approvers. Approvers are:

- Responsible for reviewing and endorsing purchase requests regularly and confirming adherence to budgetary requirements
- Guaranteeing the best possible value for the purchase
- Approving purchase orders
- Overseeing delivery, and resolving any problems or conflicts that may arise