Electronic Purchase Orders

In the past, the task of distributing Purchase Orders (POs) to vendors was taken on by the Office of Contracting & Procurement. The department had guidelines based on historical processes (POs issued for reimbursement were not to be mailed; Meal Money POs were to be sent to Accounts Payable; etc.) as well as instructions included in Doc Text or via emails to requisitions@rowan.edu. Due to the changes over the last few years (new schools; multiple campuses; etc.) as well as a significant increase in the number of purchase orders issued annually (we issued approximately 20,000 in FY14), it has been determined that now is the time to implement an electronic PO distribution process.

Once the system has been turned on, when finalized purchase orders are sent to “print” both a hard copy of the PO and an email will be generated. The email will be sent to the end user who entered the requisition and will contain a PDF attachment of the PO. Once the PO copy has been received by the end user, it will be their responsibility to distribute the PO onto the proper company representative or channel.

There will be exceptions to this process. Not all Purchase Orders will be automatically emailed:

1) **Any PO over $30,000** will still be distributed by the Office of Contracting & Procurement due to the need for second signatures and other potential compliance requirements;
2) **OfficeMax** POs will be sent to the end user, but end users will not need to forward these on to the vendor. As our system now operates, as soon as we “approve” the requisition in the OM system, the order is placed so no other vendor notification is required.
3) **Information Technology POs** will be sent to the end user but end users are **NOT** to forward these orders on. Contracting & Procurement will continue to forward these purchases along with the applicable IT approvals and quotes to ir@rowan.edu. IT purchases (software or hardware) require a final internal (IT) review before issuance.

New Mailboxes

Formerly, requisitions@rowan.edu was the email destination for the Office of Contracting & Procurement. This inbox was used for a myriad of reasons, including but not limited to general inquiries, cancellations, change orders, requests, and vendor related material. We lightened the load previously by adding:

- bids@rowan.edu (for all inquiries or information regarding active public bids);
- opra@rowan.edu (for all public record requests and information regarding same); and
- contracts@rowan.edu (for all questions and processing of contracts).

These changes increased our response time to not only the items noted for each of the new mailboxes, but also for the remaining questions and requests still coming in through requisitions@rowan.edu. Due to the same changes that have brought about the electronic PO process discussed above, we have now opened two new mailboxes:

- changeorders@rowan.edu and
- closeouts@rowan.edu

The change order mailbox is to be used for all change orders requests, whether an increase or decrease is required. When sending in a request for change order it is helpful to include the amount of the change; whether it is an increase or a decrease; what created the need for the change; and what the new PO total will be. For example:
FYI: The New PO total is the result of the change order on the original PO amount. In this case, the original PO was for $116.00. $116.00 + $75.00 = $191.00.

The close out mailbox should be used to close or cancel any Purchase Orders or Requisitions. When sending in your request, end users must first determine whether the purchase order should be closed or cancelled.

If the purchase order has **not had any activity** (check on FOIDOCH in Native Banner) the PO should be **cancelled**. We would also cancel the requisition.

**FOIDOCH:**

EMAIL REQUEST:

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To: closeouts  
Cc:  
Subject: cancel P1502804

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Once the PO has been cancelled FOIDOCH will show both items cancelled:
If there has been activity as evidenced on FOIDOCH:

End users should request we close out the balance and release the funds still encumbered.

QUESTIONS AND ANSWERS

1. When will Electronic Purchase Order system be implemented?  
   The new system will go live on Monday, 8/25/14.

2. What do we do if someone is out and the PO is emailed to them?  
   This concern regarding personnel back up is something each department should work out in the manner most appropriate. Our suggestion would be to utilize the “Create Rule” options available through Outlook to automatically forward all POs emailed to either a central mail box utilized by your department or to send them to the backup person designated for each end user.