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Section 1: Introduction to Drury University Purchase Orders

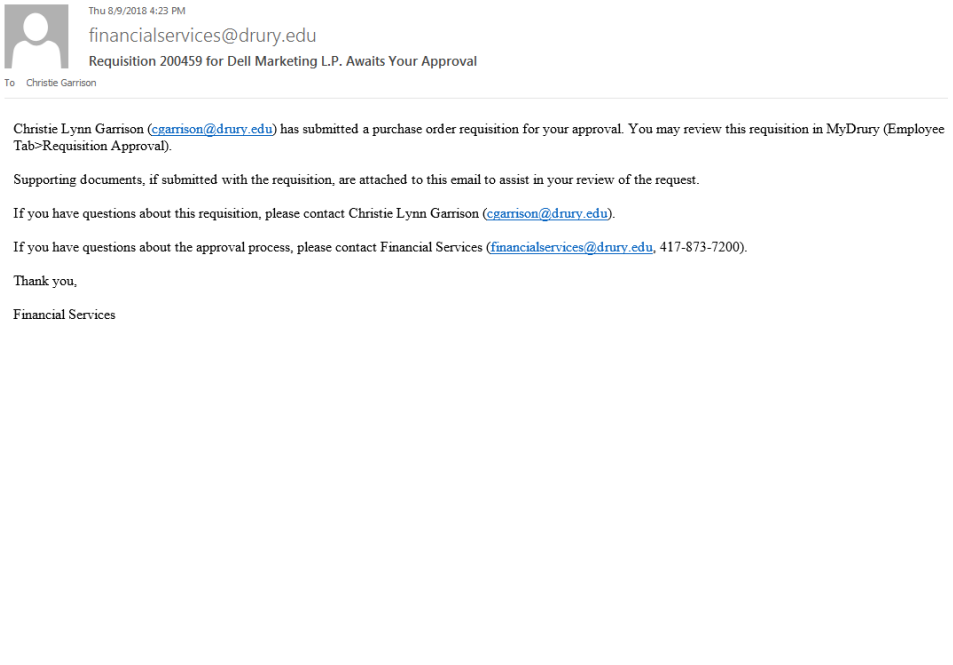
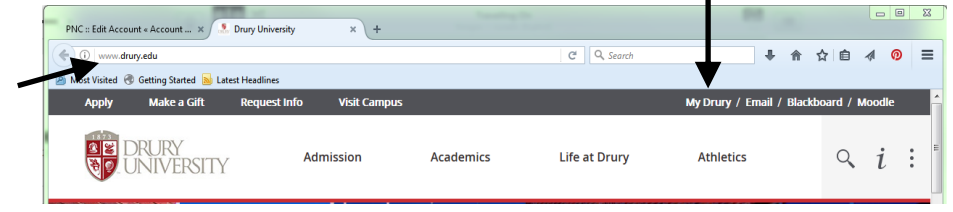
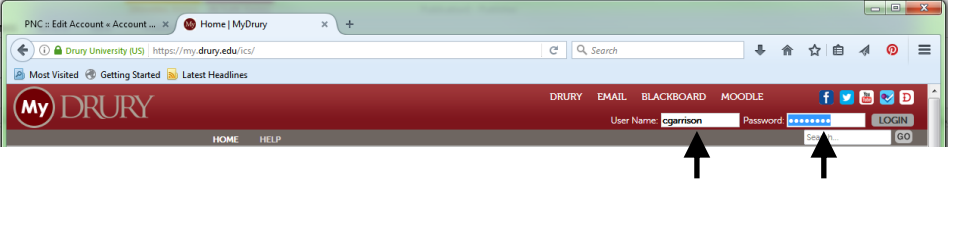
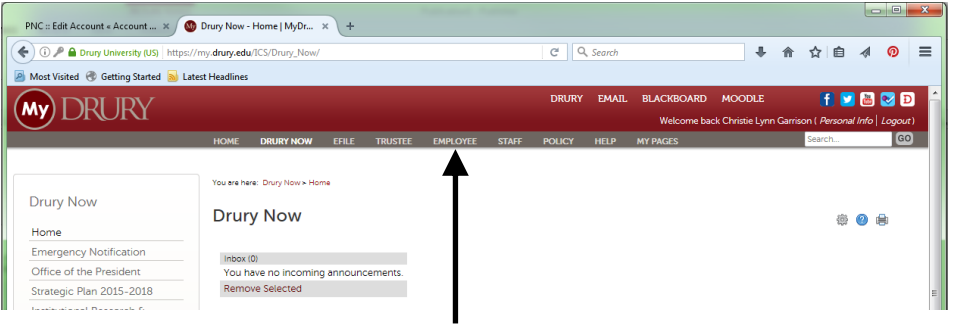
Drury's purchase order (PO) system is designed to require budget managers and division heads to approve expenditures before they are made and to track encumbrances against departmental/divisional budgets. **POs are issued prior to the placement of an order.**

- A. Policy Overview (from policy 405.101P: Purchasing)
 - 1. A PO must be used to authorize and encumber all purchases over \$500 (except purchases of travel fares and hotel expenses, which should adhere to 405.103P: Travel Expenses). POs are not necessary for orders less than \$500 unless required by the vendor.
- B. Process Overview:
 - 1. Only University employees with administrative access to the account(s) which will be used for the requisition may enter a Purchase Order Requisition (POR) through MyDrury. If an employee is without budget access to the necessary account(s), he/she must request that someone with budget access (budget manager or his/her assistant) enter the POR **OR** the requester must fill out form 405.101F2: Purchase Order Requisition – RESTRICTED USE and submit it to Administrative Services for manual entry into Jenzabar EX.
 - 2. Before beginning a POR, the requester must complete form 405.101F1: Purchasing Checklist, \$500-\$4,999 or form 405.102F1: Competitive Bidding Analysis and Justification of Vendor Selection, in accordance with policies 405.101P: Purchasing and 405.102P: Competitive Bidding.
 - 3. The requester will submit a POR through the purchasing system in MyDrury; in special circumstances (e.g., purchases in a different fiscal year, etc.; see guide 405.003Q5: Understanding the Fiscal Year) a hard copy POR (form 405.101F2: Purchase Order Requisition – RESTRICTED USE) will be submitted to Administrative Services for manual entry in Jenzabar EX.
 - 4. Once a POR receives final approval, a PO is created and the requester is notified by email that they may download a pdf.
 - 5. The requester transmits a copy of the PO to the vendor to place the order.
 - 6. The creation of a PO will generate an encumbrance of the PO amount on the general ledger account(s) specified on the POR. This encumbrance will be relieved when the invoice is paid through Accounts Payable or manually unencumbered by Administrative Services. Budget officers should examine their budgets throughout the fiscal year to ensure that all PO encumbrances are removed.
 - 7. Requests should be submitted with sufficient time to obtain price quotations, receive approval, and place orders without causing undue delay. Please provide as much lead-time as possible. **Requesters should not expect that a PO will be issued with less than 24 hours lead time.**
- C. DO NOT use the MyDrury PO system if:
 - 1. Your request spans more than one fiscal year.
 - 2. Your request will be divided between more than one account and you do not have budget privileges for **all accounts** that will be used.
 - 3. If your request meets any of the above criteria, you must submit a hard copy form 405.101F2: Purchase Order Requisition – RESTRICTED USE to Administrative Services for entry directly into Jenzabar EX.

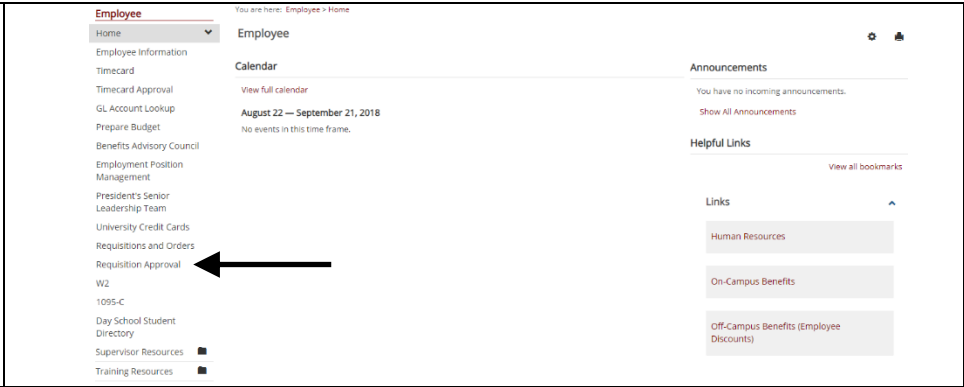
Section 2: Contacts

Program Administrator	Christie Garrison	417-873-7200	cgarrison@drury.edu
Controller	Chelsey Dollarhide	417-873-7711	cdollarhide001@drury.edu
Chief Financial Officer	Jeff Huinda	417-873-7214	jhuinda@drury.edu
Accounts Payable Coordinator	Megan Coleman	417-873-7389	mcoleman003@drury.edu

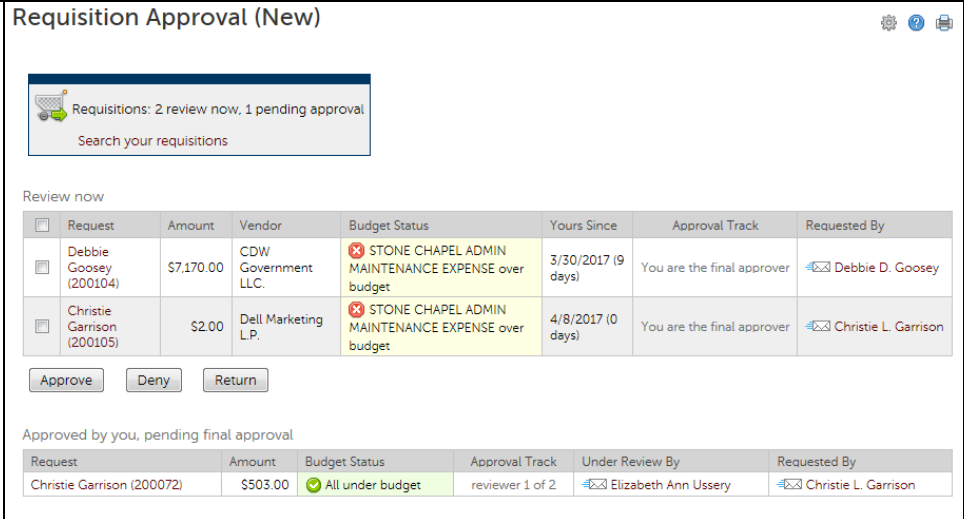
Section 3: PO Review and Approval/Return/Denial

<p>A. When a POR is submitted which affects a GL account under your purview, you will be notified by email from Jenzabar (using the program administrator's email address).</p> <p>The email will contain the name of the person requesting the PO and any documents that were attached to the requisition for review.</p> <p>The actual review and approval/return/rejection of the POR will occur in MyDrury.</p>	 <p>Thu 8/9/2018 4:23 PM financialservices@drury.edu Requisition 200459 for Dell Marketing L.P. Awaits Your Approval</p> <p>To: Christie Garrison</p> <p>Christie Lynn Garrison (cgarrison@drury.edu) has submitted a purchase order requisition for your approval. You may review this requisition in MyDrury (Employee Tab>Requisition Approval).</p> <p>Supporting documents, if submitted with the requisition, are attached to this email to assist in your review of the request.</p> <p>If you have questions about this requisition, please contact Christie Lynn Garrison (cgarrison@drury.edu).</p> <p>If you have questions about the approval process, please contact Financial Services (financialservices@drury.edu, 417-873-7200).</p> <p>Thank you, Financial Services</p>
<p>B. Go to the university's home page at www.drury.edu.</p> <p>C. Click on the MyDrury link.</p>	 <p>Arrows point to the address bar (www.drury.edu) and the 'My Drury / Email / Blackboard / Moodle' link in the top navigation bar.</p>
<p>D. Log into MyDrury using your standard Drury credentials (i.e., the username and password you use to log in to any network computer on campus).</p>	 <p>Arrows point to the 'User Name: cgarrison' field and the 'Password: [masked]' field.</p>
<p>E. On the MyDrury home screen, click on the Employee link.</p>	 <p>An arrow points to the 'EMPLOYEE' link in the top navigation bar.</p>

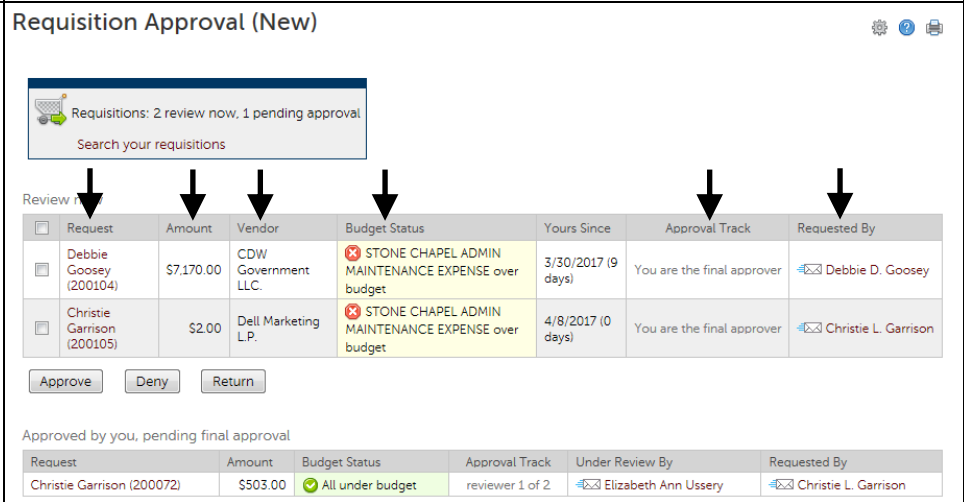
F. On the Employee page, click on the **Requisition Approval** link.



G. On the Requisition Approval page, you will be able to see all PORs that pertain to your accounts.



H. The page will show you very basic information about the POR, such as the POR number, the amount, the vendor, whether the account in question is within or over its budget, other approvals required after your approval, and the requester's name.



I. If you know enough about the request to make a decision without further review, you may **Approve, Deny, or Return** the POR using the buttons under the **Review Now** section of the screen.

Requisition Approval (New)

Requisitions: 2 review now, 1 pending approval
Search your requisitions

Review now

Request	Amount	Vendor	Budget Status	Yours Since	Approval Track	Requested By
<input checked="" type="checkbox"/> Debbie Goosey (200104)	\$7,170.00	CDW Government LLC.	STONE CHAPEL ADMIN MAINTENANCE EXPENSE over budget	3/30/2017 (9 days)	You are the final approver	Debbie D. Goosey
<input type="checkbox"/> Christie Garrison (200105)	\$2.00	Dell Marketing L.P.	STONE CHAPEL ADMIN MAINTENANCE EXPENSE over budget	4/8/2017 (0 days)	You are the final approver	Christie L. Garrison

Approve Deny Return

Approved by you, pending final approval

Request	Amount	Budget Status	Approval Track	Under Review By	Requested By
Christie Garrison (200072)	\$503.00	All under budget	reviewer 1 of 2	Elizabeth Ann Usery	Christie L. Garrison

J. If you want to see additional details of the POR or make changes, click on the POR number.

Requisition Approval (New)

Requisitions: 2 review now, 1 pending approval
Search your requisitions

Review now

Request	Amount	Vendor	Budget Status	Yours Since	Approval Track	Requested By
<input type="checkbox"/> Debbie Goosey (200104)	\$7,170.00	CDW Government LLC.	STONE CHAPEL ADMIN MAINTENANCE EXPENSE over budget	3/30/2017 (9 days)	You are the final approver	Debbie D. Goosey
<input checked="" type="checkbox"/> Christie Garrison (200105)	\$2.00	Dell Marketing L.P.	STONE CHAPEL ADMIN MAINTENANCE EXPENSE over budget	4/8/2017 (0 days)	You are the final approver	Christie L. Garrison

Approve Deny Return

Approved by you, pending final approval

Request	Amount	Budget Status	Approval Track	Under Review By	Requested By
Christie Garrison (200072)	\$503.00	All under budget	reviewer 1 of 2	Elizabeth Ann Usery	Christie L. Garrison

K. From the Request Summary, you may review/adjust:

- The account number(s) used on the POR
- The items requested, their quantity, and price
- Documents attached to the POR
- The requester's name
- The "Need By" date
- The vendor
- The shipping location
- Additional comments
- Additional files
- Requested for name

Requisition Approval (New)

Cancel, go back Christie Garrison (200105) Pending Approval

Requested items

STONE CHAPEL ADMIN MAINTENANCE EXPENSE (271-745-32221-25900)	\$7,182.00 over budget after purchase	\$2.00
1.00 test item at \$2.00 for \$2.00		
		Total: \$2.00

Request summary

Requester name: Christie Garrison

Request date: 04/08/2017 Need by date: 4/30/2017

Vendor: 87295 Search
Dell Marketing L.P. - c/o Dell USA LP, P.O. Box 802816, Chicago IL, 60680-2816

Ship order here: Administrative Services
Drury University, 900 N. Benton Ave., Springfield, MO 65802

No Comments/Attachments

Add a comment Add a file

Requested for: Search

Request status: Pending approval by you. Approval track: Test Track - C. Garrison

Approve Return to Christie L. Garrison Deny request

L. If you need to edit the account number(s), item description, item quantity, or price, click on the pencil icon.

Requisition Approval (New)

Cancel, go back Christie Garrison (200105) Pending Approval

Requested items

STONE CHAPEL ADMIN MAINTENANCE EXPENSE (271-745-32221-25900)	\$7,182.00 over budget after purchase	\$2.00
1.00 test item at \$2.00 for \$2.00		
		Total: \$2.00

Request summary

Requester name: Christie Garrison

Request date: 04/08/2017 Need by date: 4/30/2017

Vendor: 87295 Search
Dell Marketing L.P. - c/o Dell USA LP, P O Box 802816, Chicago IL, 60680-2816

Ship order here: Administrative Services
Drury University, 900 N. Benton Ave., Springfield, MO 65802

No Comments/Attachments

Add a comment Add a file

Requested for: Search

Request status: Pending approval by you. Approval track Test Track - C.Garrison

Approve Return to Christie L. Garrison Deny request

M. Edit the required information and click **Save** at the bottom of the screen.

NOTE: The system will allow you to edit only the account(s) shown on the screen. It will not allow you to add a split. If the account number(s) need additional splitting, you will have to return or reject the POR so that the requester may edit it.

Requisition Approval (New)

Cancel, go back Christie Garrison (200105) has 1 item \$2.00

Request date: 04/08/2017 The Request date determines the budget to be used for this request and the projects available. To request items using another budget period or other projects, you must enter a new request.

Budget year: Jun 2016 - May 2017 (Board Approved)

- Enter the item**
Item: test item
Quantity: 1.00 * Price \$ 2.00 * Total \$ 2.00
Shipment container (box, case, etc.): each
- Charge to** Search for account
Budget account: 2 71 745 32221259 * \$7,184.00 over budget after purchase
Split items
- More details about the item**
Detailed description:
1 file attached: Example File.docx
Add supporting documentation

* Required, please fill these out. Save Cancel, return to request

N. Once you have completed your review or edits, you may **Approve**, **Return**, or **Deny** the POR using the buttons at the bottom of the screen.

Requisition Approval (New)

Cancel, go back Christie Garrison (200105) Pending Approval

Requested items

STONE CHAPEL ADMIN MAINTENANCE EXPENSE (271-745-32221-25900)	\$7,182.00 over budget after purchase	\$2.00
1.00 test item at \$2.00 for \$2.00		

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Vendor: 87295 Search Ship order here: Administrative Services

Dell Marketing L.P. - c/o Dell USA LP, P O Box 802816, Chicago IL, 60680-2816 Drury University, 900 N. Benton Ave., Springfield, MO 65802

No Comments/Attachments

Add a comment Add a file

Requested for: Search

Request status: Pending approval by you. Approval track Test Track - C.Garrison

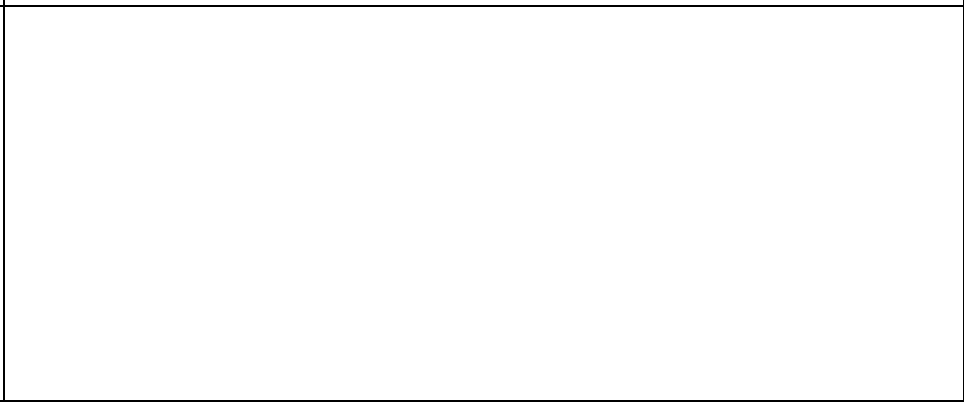
O. If you approve or return the POR, you will be returned to the Requisition Approval page.

If you deny a POR, you will have to confirm an additional time before you are returned to the Requisition Approval page.

If a request is denied, it is permanently inactive and cannot be reactivated for further processing. To inactivate the request, click OK. To modify or return this item back to the requester for additional processing, click Cancel.

P. The requester will receive an email relaying your action (i.e., POR approved, PO created; POR returned for editing; POR denied) and additional instructions.

Your duties are complete until the original POR is resubmitted or a new POR arrives in your queue.



Section 4: FAQs

What is the difference between returning a requisition and denying a requisition?

Returning a requisition allows the requester to make corrections and resubmit the requisition. Denying a requisition stops the process completely, and does not allow for any editing or resubmission.

Can I edit a requisition before I approve it?

In most circumstances, yes; however, if your changes affect the approval track under which the requisition was submitted, the system will not allow you to save those changes. In such a case, you would need to return the requisition to the requester for editing and resubmission.

I'm not receiving notices to approve requisitions from my personnel. What do I do?

Place a work order with Technology Services at help@drury.edu.