Transitioning All Purchase Orders from Banner to ProConnect

ALL PURCHASE ORDERS IN BANNER WILL BE CLOSED THIS FISCAL YEAR.

Whether your budget is rolling, i.e., capital, grant, startup, *all* purchase orders *must* be closed in Banner and new requisitions entered in ProConnect. It is a requirement this fiscal year to transition all purchase orders from Banner to ProConnect. If you do not request Closeouts for your Banner POs here, they will be systematically closed beginning on June 30th, 2025.

Note: If the POs are systematically closed, they will *not* be able to reopen, which means that outstanding invoices will not be paid against the closed PO. A new requisition will need to be entered into ProConnect and will be paid for using next fiscal year's budget.

> **Keep in Mind:**
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> All invoices must be paid prior to closing any pos whether they originated in Banner or ProConnect.
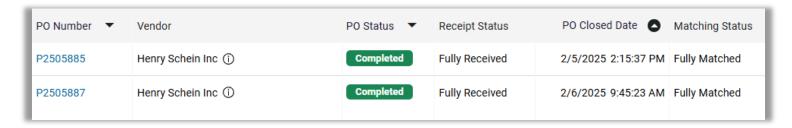>
> If your PO has multiple line items, it cannot be closed individually. Due to limitations in system functionality, the entire PO will need to be closed. This applies to Banner and ProConnect purchases.

Recommendations for purchase orders that originated in Banner:

1. If your purchase order is not funded by a capital, grant, or startup fund, please follow past Banner Closeout processes. Anything left open will be systematically closed.
2. If your purchase order typically rolls, please begin requesting closeouts. Once you have confirmation that your closeout has been processed, you can create new requisitions immediately. *Refer to the PO that you are replacing, so that OC&P can pull any necessary documentation from our archives for that PO.*

How do I create a Closeout for a purchase order that was initiated in ProConnect?
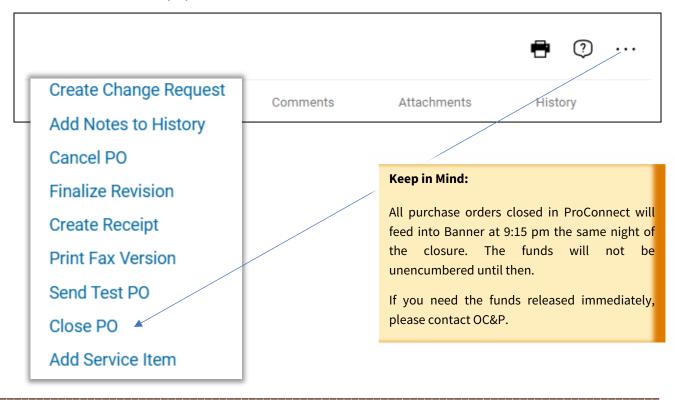
- Go to **Orders>My Orders>My Purchase Orders**
- Use the Filter Tool to organize your view.
- Review your open purchase orders and determine which POs can and should be closed.
- A Fully Matched status is a good indicator that your PO can be closed. If you have a standing order, review the available invoices and confirm they have been processed. If unsure, contact the vendor to confirm that all invoices have been sent to invoices@rowan.edu for processing.

PO Number ▼	Vendor	PO Status ▼	Receipt Status	PO Closed Date ▲	Matching Status
P2505885	Henry Schein Inc ⓘ	Completed	Fully Received	2/5/2025 2:15:37 PM	Fully Matched
P2505887	Henry Schein Inc ⓘ	Completed	Fully Received	2/6/2025 9:45:23 AM	Fully Matched

- Select **PO Number >(…)>Close PO**

Create Change Request

Add Notes to History

Cancel PO

Finalize Revision

Create Receipt

Print Fax Version

Send Test PO

Close PO

Add Service Item

Comments   Attachments   History

Keep in Mind:

All purchase orders closed in ProConnect will feed into Banner at 9:15 pm the same night of the closure. The funds will not be unencumbered until then.

If you need the funds released immediately, please contact OC&P.

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How do I request a Closeout for a purchase order that was initiated in Banner?

Step 1:

- Please check the PO status in FGIENCD in the Encumbrance Detail section to ensure your PO is in "O" (open) status. If your status is "C" closed, you will not need to fill out this form. Your PO has already been closed.
- Pro Tip: Your Encumbrance Detail may have multiple pages; you will need to check each page to know if your PO is fully closed.

Step 2:

- Request PO closeout here.
- Once closed, you will receive confirmation from an OC&P team member.

For all questions, please reach out to proconnectsupport@rowan.edu.