High Level Description

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Overview

Once an express purchase order has been approved by the end user it in a sense becomes the property of the Purchasing Department. The department can no longer add to it, change it in any fashion or cancel it. If they desire to do any of those they must contact the purchasing department in writing or by email to advise them of this need, give a reason for it. If the purchase order has been assigned to a buyer, the department should contact the buyer involved and if it has not been assigned to the buyer the department will contact the management analyst directly. If the buyer receives this notification he will review the purchase order to verify its status to advise the vendor if necessary and to determine if the University has been obligated to pay for any commodity or service on this order. If the buyer agrees that the line in the Purchase Order can be cancelled he will forward his findings and the request to the Management Analyst, if not he will advise the department of his findings.
Cancellation of a Purchase Order-Dispatched

Check the Activity Summary
Before canceling a line in a Purchase Order that has already been dispatched you must verify that there have been no receiving or voucher activities against the Purchase Order.

Navigate to Purchasing
> Review PO Information
> Activity Summary

The PO Activity Summary page displays.

1. Enter the Purchase Order number (In this case we have selected PO 0000008478)

2. Click Search
This takes you to the Activity Summary for that purchase order. This includes Receiving Information and Invoice activity.

The Activity summary page displays.

The summary will default to a check in line 1. In our example we are to cancel line 2 of the Purchaser Order.

3. Check the box in line 2
Note that there has been no receiving activity in either the receiving or invoice areas with both reading 0.

Cancel a Dispatched PO

Navigate to Purchasing > Purchase Orders > Maintain Purchase Orders

1. Select the Find an Existing Value tab or use the link

The Purchase Order page displays.

2. Enter the 10 digit Purchase Order Number including all the 0’s

Note: It is not necessary to count the 0’s to insure you have the proper PO number instead type in the last 4 digits of the purchase order number and then insert a 0 in front of that, hold down the 0 until it stops.

3. Click Search

This will take you to the Header of the PO Form.
The PO Form page displays.

4. Click line 2

Note when you do this, the Line Details is not highlighted and can not yet be accessed.

5. Click Refresh to access Line Details

6. Click Line Details link

This takes you to the Line Details page.

The Line Details -- PRISONINDU-001 page displays.

Note: Note the red X at the upper right of the page. This means that the cancellation feature is available to you.

7. Click the X icon to cancel

This gives you a message asking you if you really want to cancel the line.

8. Click Yes to cancel
The PO Form page displays.

Notice that the Budget Status now reads Not Chk’d. This requires you to budget check the PO.

Go to the Header Comments to explain why you have cancelled the line.

9. Click the Header Comments link

The Header Comments page displays.

Note: If the Header Comments section contains information, you should consider adding a second header comment which will be only related to the cancellation of the line.

10. Click Add (+) to add a new comment

11. Enter the explanation for the cancellation and the date of the activity

12. Check the Send to Vendor box

Note: This insures that the information will print on the purchase order. If you do not want it to print, then leave it blank.

13. Click OK

Note: This takes you back to the Header Panel.
The PO Form page displays.

14. Click the **Budget Check** icon to Budget Check the Purchase Order by

*Note: The icon is a magnifying glass over a spreadsheet.*

Note that the **PO Status** now reads **Approved**. Therefore it will be necessary for you to Dispatch the Purchase Order.

15. Click **Save**

There are a number of ways to Dispatch a Purchase Order but for this example we will use the **Dispatch function** in the more box of the purchase order header. This takes you to the **Report Detail** page.
The Report Detail page displays.

15. Click the PDF file link

*Note: In this case popo005_401606.PDF.*

The Purchase/Service Order page displays.

Notice the PO has Canceled listed at the top right above the left of the Order Number. Additionally the line also shows CANCEL and the extended price reads 0.

*Note: This is printed and given to the buyer to file and if necessary to send off to the vendor.*

**Whom to Contact for Help?**

For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).