### High Level Description

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### Revision Control

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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.
Cancellation of a Purchase Order-Non Dispatched

Before Canceling the PO

Navigate to Purchasing > Purchase Orders > Express POs

The Express Purchase Order page displays.

1. Click the Find an Existing Value tab
2. Enter Express Purchase Order Number
   
   Note: For our example 0000008565.

3. Click Search
The Express Purchase Order page displays.

Check to see if the Express Purchase Order has been assigned to a buyer. If it has, please insure that the buyer has been made aware of the request and agrees with it. If not he will need to contact the department to resolve his concerns.

Note: A purchase order cannot be cancelled if it is on hold.

Check the header details to determine if it is on hold or not, once this is resolved or if the Express Purchase Order has not been assigned.

4. Click the Header Details link

The PO Header Details page displays.

If the order is still on hold as it is here.

5. Check box Hold from Further Processing

6. Click OK

The Express Purchase Order page displays.

7. Click the Headers Comments link

The PO Header Comments page displays.

You will need to explain the reason the PO is to be cancelled.

8. Check the Send to Vendor box

Note: This insures the information prints on the PO

9. Click OK

This brings you back to the Header panel.

The Express Purchase Order page displays.

10. Click Save and go to the Reconciliation Workbench to cancel the express purchase order.
Cancel the Purchase Order

Navigate to Purchasing > Purchase Orders > Reconciliation Workbench

The Reconciliation WorkBench page displays.

If you have set up a run control for this process look for it.

1. Select the Find an Existing Value tab
2. Click Search

The Search Results page displays.

3. Select the Run Control

Note: In this example we will use **MYCAN**.
The Filter Options page displays.

If the run control has been used before, it may contain previous information. If so, change it to satisfy your current needs.

Note: In this example we will delete the 8492 and replace it with 8565.

4. Click the Search Key at the bottom of the page

This takes you to the List of Purchase Orders section.

The List of Purchase Orders section displays.

Insure that the purchase order is the one you wish to cancel and that it is also not in hold status (N for no and Y for yes).

5. Click Cancel

This will take you to the Processing Results page.
The Processing Results page displays.

6. If the information is correct, click Yes

This generates your final warning to insure that you do indeed want to cancel the PO.

7. Click Yes

This brings you back to the status page.

The List of Purchase Orders section displays.

Note the PO Status is now listed as Canceled.

8. Click Preview to print of copy of the cancel PO

This opens a new page in your browser in the Administration Portion of the Report Manager.
9. Click Refresh until the information comes up.

To view the PO, the status must be posted.

10. Click Details once it is posted.

This takes you to Report Detail.

The Report Detail page displays.

11. Click the PDF file link to view the actual PO.

Note: In this case popo005_401607.PDF.

The Purchase/Service Order displays.

Note: Notice the PO has Canceled listed at the top right above the left of the Order Number. But in this case no information appears on the Purchase Order. That is the reason you will need to make note of the reason you wish to cancel a PO and enter in the header comments section of the PO.
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).