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, giving 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 Line Requested by Department

Navigate to Purchasing > Purchasing Order > Review PO Information > 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.

The PO Activity Summary page displays.

1. Enter the Purchase Order number
2. Click search

Note: In this case we have selected PO 0000008478

Note:

- This takes you to the Activity Summary for that purchase order. This includes Receiving Information and Invoice activity.
- The summary will also default to a check in line 1. In our example we are to cancel line 2 of the Purchaser Order.

3. To view line 2 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.

Navigate to Purchasing > Purchase Orders > Maintain Purchase Orders
Purchase Order page displays.

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

5. 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.*
This will take you to the Header of the PO Form.

6. Click line 2

Note that Line Details is not highlighted and can not yet be accessed.

7. Click Refresh to access Line Details

8. Click the Line Details link

The Line Details page displays.

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

9. Click the X to cancel

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

10. Click Yes to cancel the line.
This brings you back to the header panel. Notice that the Budget Status now reads Not Chk’d. This requires you to budget check the PO. Before you do this however, go to the Header Comments to explain why you have cancelled the line.

11. Click Header Comments link

The PO Header Comments page displays.

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.

12. Click on the Add (+) button

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

14. Check the box “Send to Vendor” to insure that the information will print on the purchase order

*Note: If you do not want it to print, then leave it blank.*
15. Click OK

This takes you back to the Header Panel.

16. Click Budget Check icon to the right of the red X

*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. Also note that the number 1 appears with Chng Order at the top of the panel.

17. 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.

The Dispatch Options page displays.

This page will normally have defaults in it that need to be changed. For instance the Test Dispatch and Print Copy boxes are checked here.

18. Correct those to be open
19. Click on the magnifying glass
20. Select Server Name

The Look Up Server Name page displays.

21. Select the PSNT

Note: This will fill in the server portion of the Dispatch Options.
22. Click OK

This takes you to a warning page, giving you the option to wait until the Purchase Order Dispatch Process is completed.

If you click yes will wait on this page with a red Processing flashing on and off in the upper right corner of the page until completed and then returned to the header page.

When returned to the Header page you will note the PO Status is now listed as Dispatched.

Now you will need to go to the Process Monitor to see the Purchase Order and to print it.

Navigate to People Tools > Process Scheduler > Process Monitor

23. Click Details for the Process that performed

Note: You can identify it by the time.
The Report Detail page displays.

*Note: Process Instance in this case is Instance 401614*

24. Click the PDF file link

Notice Change Order appears at the top of the Purchase Order next to the order number. And that on Page 2 of the PO the explanation prints.

25. If you do not desire to wait, click No

This will give you a message and the instance number to locate the purchase order in the Process Monitor. And you can recover the purchase order at a later time.

**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).