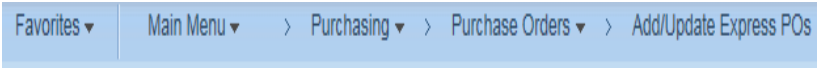


LAST REVISED DATE: 09/13/2019

General Information

Task	Process Information
<p>Canceling an Express PO (Purchase Order)</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>Use this tip sheet to cancel an Express Purchase Order under the following circumstances:</p> <ol style="list-style-type: none"> 1) The Express Purchase Order was entered by mistake 2) The Express Purchase Order is a duplicate 3) The Express Purchase Order is required to be canceled by the Purchasing organization. <p>An Express Purchase Order must be in one the following states in order to be canceled:</p> <p><u>An Express Purchase Order is allowed to be canceled when the PO Status is: 'Approved'</u> (whether Budget Checked or not Budget Checked) and there is no activity, or the PO Status is: 'Dispatched' and there is no activity. No activity means the Express PO does not have any receipts or associated vouchers posted against it.</p> <p><u>An Express Purchase Order is NOT allowed to be canceled when the PO Status is: 'Dispatched' or 'Approved'</u> and it has had activity.</p> <p>The steps and messages will be different when canceling an Express PO based on what status the Express PO is in prior to canceling it. These instructions provide the steps to cancel an Express PO for the most common scenarios. If you need to cancel an Express PO which does not fit the most common scenarios, you should call the Procurement Office or complete a Help Desk ticket for further assistance.</p>


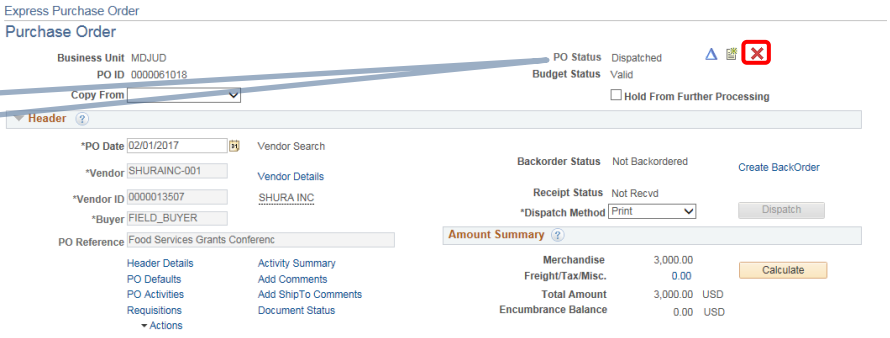
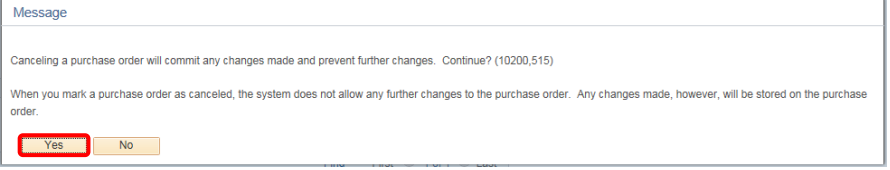
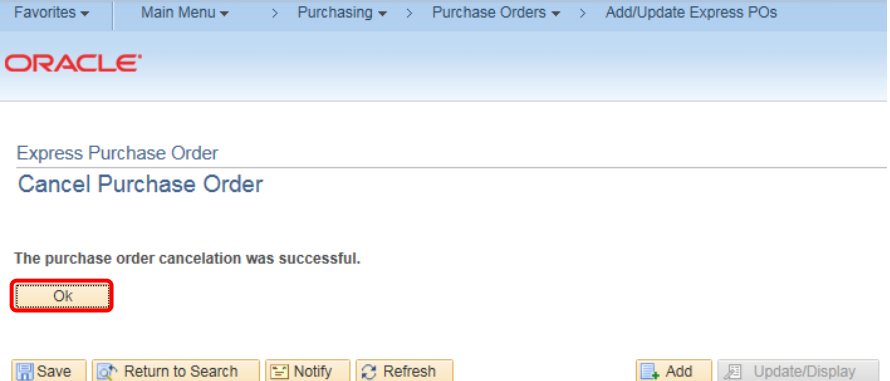
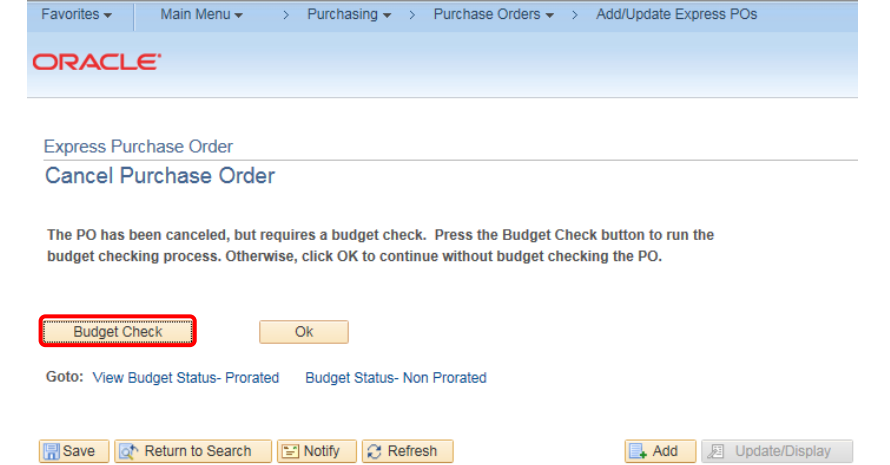
GEARS Navigation

<p>Main Menu > Purchasing > Purchase Orders > Add/Update Express POs</p>	
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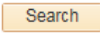
1.0 Process

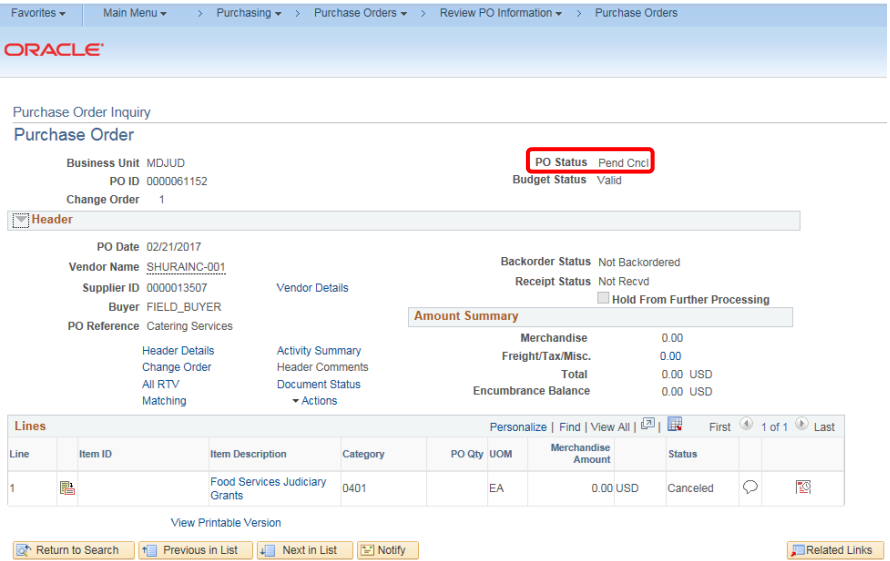
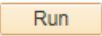
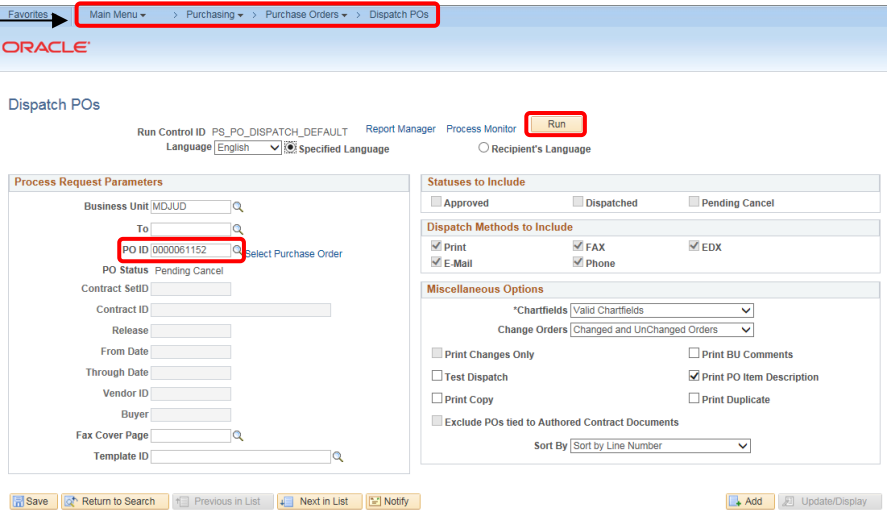
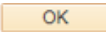
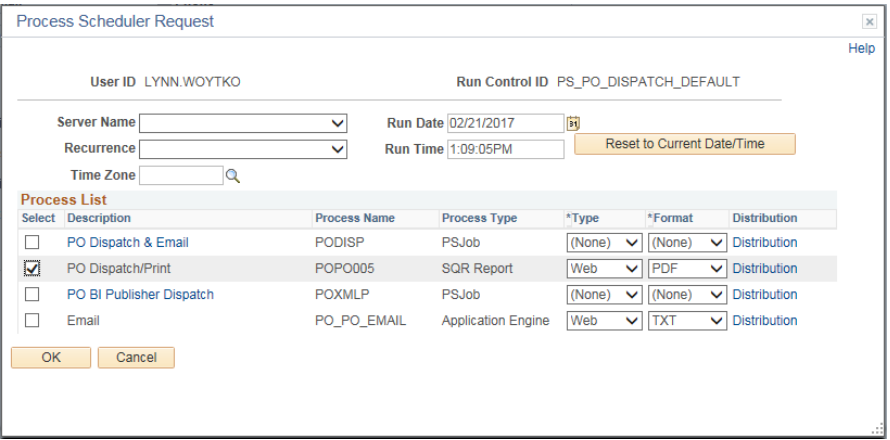
This document is intended to provide a quick reference to canceling an Express Purchase Order within GEARS.

STEP	ACTION	DETAILS
1.	Select the "Find an Existing Value" Tab	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p>
2.	Enter your PO ID in the field PO ID:	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>▼ Search Criteria</p> <p>Business Unit = <input type="text" value="MDJUD"/> </p> <p>PO ID begins with <input style="border: 2px solid red;" type="text"/></p> <p>Purchase Order Date = <input type="text"/> </p> <p>PO Status = <input type="text"/></p> <p>Short Vendor Name begins with <input type="text"/> </p> <p>Vendor ID begins with <input type="text"/> </p> <p>Vendor Name begins with <input type="text"/> </p> <p>Buyer begins with <input type="text"/> </p> <p>Buyer Name begins with <input type="text"/> </p> <p>PO Type = <input type="text"/></p> <p>Purchase Order Reference begins with <input type="text"/></p> <p>Hold From Further Processing <input type="checkbox"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p>
3.	Click the button.	

<p>4.</p>	<p>To cancel this purchase order, click the Cancel PO icon (red X).</p> 	
<p>5.</p>	<p>A message will be displayed explaining that canceling a purchase order will prevent any further changes, and asking if you would like to continue.</p> <p>Click the Yes button.</p>	
<p>6.</p>	<p>If your Express PO had a PO Status of 'Approved' but had NOT been budget checked or dispatched, then a message will be displayed explaining that the "The PO cancelation was successful".</p> <p>Click the OK Button.</p>	
<p>7.</p>	<p>If your Express PO had a PO Status of 'Approved' and had been budget checked, but had NOT been dispatched, then a message will be displayed explaining that the "The PO has been canceled, but requires a budget check."</p> <p>Click the Budget Check Button.</p>	

<p>8.</p>	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> but had <u>NOT</u> been <u>received or vouchered</u>, then a message will be displayed explaining that the <u>"PO has 'Pending Cancel' status, but requires a budget check."</u></p> <p>Click the Budget Check Button.</p>	<p>Express Purchase Order Cancel Purchase Order</p> <p>PO has 'Pending Cancel' status, but requires a budget check. Press the Budget Check button to run the budget checking process. Otherwise, click OK to continue without budget checking the PO. Also, PO has 'Pending Cancel' status. Dispatch PO to set the status to 'Canceled'.</p> <p>Budget Check Ok</p> <p>Goto: View Budget Status- Prorated Budget Status- Non Prorated</p> <p>Save Return to Search Notify Refresh Add Update/Display</p>												
<p>9.</p>	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been <u>partially or fully received</u>, then a message will be displayed explaining that the <u>"Line has been received, you may not cancel /line/schedule/distribution."</u></p> <p>NOTE: This Express PO cannot be canceled, unless the associated Receipts are canceled.</p>	<p>Express Purchase Order Cancel Purchase Order</p> <p>Business Unit MDJUD PO ID 0000061153 Vendor SHURAINC-001</p> <p>Return to Main Page</p> <p>Error Personalize Find View All Print Refresh First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Sched</th> <th>Distrib</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>1</td> <td>Line has been received, you may not cancel line/schedule/distribution.</td> </tr> </tbody> </table> <p>Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display</p>	Line	Sched	Distrib	Message	1	1	1	Line has been received, you may not cancel line/schedule/distribution.				
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<p>10.</p>	<p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been <u>typed to an active Voucher</u>, then a message will be displayed explaining that the <u>"The PO Line is tied to an active Voucher, therefore it may not be canceled."</u></p> <p>NOTE: This Express PO cannot be canceled, until all associated Vouchers and Receipts (if any) are canceled.</p>	<p>Express Purchase Order Cancel Purchase Order</p> <p>Business Unit MDJUD PO ID 0000061018 Vendor SHURAINC-001</p> <p>Return to Main Page</p> <p>Error Personalize Find View All Print Refresh First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Sched</th> <th>Distrib</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td></td> <td>At least one schedule has been matched. Cannot cancel the PO.</td> </tr> <tr> <td>1</td> <td>1</td> <td>1</td> <td>The PO Line is tied to an active Voucher; therefore it may not be canceled.</td> </tr> </tbody> </table> <p>Save Return to Search Previous in List Next in List Notify Refresh Add</p>	Line	Sched	Distrib	Message	1	1		At least one schedule has been matched. Cannot cancel the PO.	1	1	1	The PO Line is tied to an active Voucher; therefore it may not be canceled.
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<p>11.</p>	<p>To view your Express Purchase Order after you cancel it, go to: Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders - Purchase Order Inquiry page</p>	<p>Express Purchase Order Cancel Purchase Order</p> <p>Business Unit MDJUD PO ID 0000061018 Vendor SHURAINC-001</p> <p>Return to Main Page</p> <p>Error Personalize Find View All Print Refresh First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Sched</th> <th>Distrib</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td></td> <td>At least one schedule has been matched. Cannot cancel the PO.</td> </tr> <tr> <td>1</td> <td>1</td> <td>1</td> <td>The PO Line is tied to an active Voucher; therefore it may not be canceled.</td> </tr> </tbody> </table> <p>Save Return to Search Previous in List Next in List Notify Refresh Add</p>	Line	Sched	Distrib	Message	1	1		At least one schedule has been matched. Cannot cancel the PO.	1	1	1	The PO Line is tied to an active Voucher; therefore it may not be canceled.
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<p>12.</p>	<p>Enter the PO ID:</p>																									
<p>13.</p>	<p>Click the  button.</p>																									
<p>14.</p>	<p>If your Express PO had a PO Status of 'Approved', your Express Purchase Order will now have a 'Canceled' PO Status.</p>	<table border="1" data-bbox="1068 1493 1446 1587"> <caption>Amount Summary</caption> <tr> <td>Merchandise</td> <td>0.00</td> </tr> <tr> <td>Freight/Tax/Misc.</td> <td>0.00</td> </tr> <tr> <td>Total</td> <td>0.00 USD</td> </tr> <tr> <td>Encumbrance Balance</td> <td>0.00 USD</td> </tr> </table> <table border="1" data-bbox="667 1602 1500 1692"> <caption>Lines</caption> <thead> <tr> <th>Line</th> <th>Item ID</th> <th>Item Description</th> <th>Category</th> <th>PO Qty</th> <th>UOM</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Food Services Judiciary Grants</td> <td>0401</td> <td></td> <td>EA</td> <td>0.00 USD</td> <td>Canceled</td> </tr> </tbody> </table>	Merchandise	0.00	Freight/Tax/Misc.	0.00	Total	0.00 USD	Encumbrance Balance	0.00 USD	Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status	1		Food Services Judiciary Grants	0401		EA	0.00 USD	Canceled
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1		Food Services Judiciary Grants	0401		EA	0.00 USD	Canceled																			

<p>15. If your Express Purchase Order had a PO Status of 'Dispatched', your Express Purchase Order will now have a 'Pend Cncl' (Pending Cancel) PO Status, until the Dispatch process is run.</p>	 <p>The screenshot shows the Oracle Purchase Order Inquiry interface. The PO ID is 0000061152. The PO Status is highlighted as 'Pend Cncl'. The Budget Status is 'Valid'. The PO Date is 02/21/2017. The Vendor Name is SHURAINC-001. The Supplier ID is 000013507. The Buyer is FIELD_BUYER. The PO Reference is Catering Services. The Amount Summary shows Merchandise at 0.00, Freight/Tax/Misc. at 0.00, Total at 0.00 USD, and Encumbrance Balance at 0.00 USD. The Lines table shows one line with Item ID, Item Description 'Food Services Judiciary Grants', Category '0401', PO Qty 'EA', Merchandise Amount '0.00 USD', and Status 'Canceled'.</p>																																			
<p>16. Follow the navigation seen on the right to Dispatch your PO.</p> <ol style="list-style-type: none"> 1. Enter the PO # in the PO ID field. 2. Click  	 <p>The screenshot shows the Oracle Dispatch POs screen. The navigation path 'Main Menu > Purchasing > Purchase Orders > Dispatch POs' is highlighted. The 'Run' button is highlighted. The Process Request Parameters section shows the PO ID field containing '0000061152' and the PO Status set to 'Pending Cancel'. The Statures to Include section has 'Approved', 'Dispatched', and 'Pending Cancel' selected. The Dispatch Methods to Include section has 'Print', 'E-Mail', 'FAX', and 'Phone' selected. The Miscellaneous Options section has 'Print Changes Only', 'Test Dispatch', 'Print Copy', and 'Exclude POs tied to Authorized Contract Documents' selected. The Sort By dropdown is set to 'Sort by Line Number'.</p>																																			
<p>17. On the next page, choose PO Dispatch/Print. Then click </p>	 <p>The screenshot shows the Oracle Process Scheduler Request dialog box. The User ID is LYNN.WOYTKO and the Run Control ID is PS_PO_DISPATCH_DEFAULT. The Server Name, Run Date (02/21/2017), Recurrence, and Run Time (1:09:05PM) fields are visible. The Process List table shows the following rows:</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>*Type</th> <th>*Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>PO Dispatch & Email</td> <td>PODISP</td> <td>PSJob</td> <td>(None)</td> <td>(None)</td> <td>Distribution</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>PO Dispatch/Print</td> <td>POPO05</td> <td>SQR Report</td> <td>Web</td> <td>PDF</td> <td>Distribution</td> </tr> <tr> <td><input type="checkbox"/></td> <td>PO BI Publisher Dispatch</td> <td>POXMLP</td> <td>PSJob</td> <td>(None)</td> <td>(None)</td> <td>Distribution</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Email</td> <td>PO_PO_EMAIL</td> <td>Application Engine</td> <td>Web</td> <td>TXT</td> <td>Distribution</td> </tr> </tbody> </table> <p>The OK and Cancel buttons are visible at the bottom of the dialog box.</p>	Select	Description	Process Name	Process Type	*Type	*Format	Distribution	<input type="checkbox"/>	PO Dispatch & Email	PODISP	PSJob	(None)	(None)	Distribution	<input checked="" type="checkbox"/>	PO Dispatch/Print	POPO05	SQR Report	Web	PDF	Distribution	<input type="checkbox"/>	PO BI Publisher Dispatch	POXMLP	PSJob	(None)	(None)	Distribution	<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Web	TXT	Distribution
Select	Description	Process Name	Process Type	*Type	*Format	Distribution																														
<input type="checkbox"/>	PO Dispatch & Email	PODISP	PSJob	(None)	(None)	Distribution																														
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<input type="checkbox"/>	PO BI Publisher Dispatch	POXMLP	PSJob	(None)	(None)	Distribution																														
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Web	TXT	Distribution																														

18. Once the Dispatch process is complete, navigate to the **Review PO Information -> Purchase Orders** page to confirm the status of 'Canceled' on the PO.

The screenshot shows the Oracle Gears interface for a Purchase Order Inquiry. The breadcrumb navigation at the top is: Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. The page title is "Purchase Order Inquiry" and "Purchase Order". Key details include: Business Unit MDJUD, PO ID 000061152, Change Order 1, and PO Status Canceled (highlighted in a red box). Budget Status is Valid. The "Header" section shows PO Date 02/21/2017, Vendor Name SHURAINC-001, Supplier ID 000013507, Buyer FIELD_BUYER, and PO Reference Catering Services. It also lists Backorder Status (Not Backordered), Receipt Status (Not Recvd), and a checkbox for Hold From Further Processing. An "Amount Summary" table shows Merchandise (0.00), Freight/Tax/Misc. (0.00), Total (0.00 USD), and Encumbrance Balance (0.00 USD). A "Lines" table below shows one line item: Line 1, Item ID, Food Services Judiciary Grants, Category 0401, PO Qty UOM EA, Merchandise Amount 0.00 USD, and Status Canceled. Navigation buttons at the bottom include Return to Search, Previous in List, Next in List, Notify, and Related Links.



End of Document