MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

LAST REVISED DATE: 03/21/2018

General Information

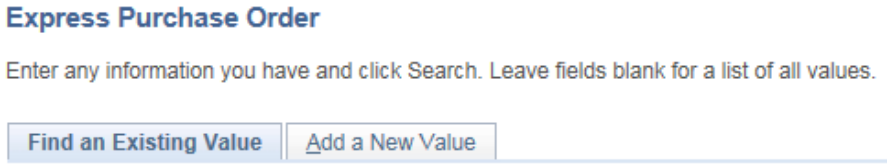
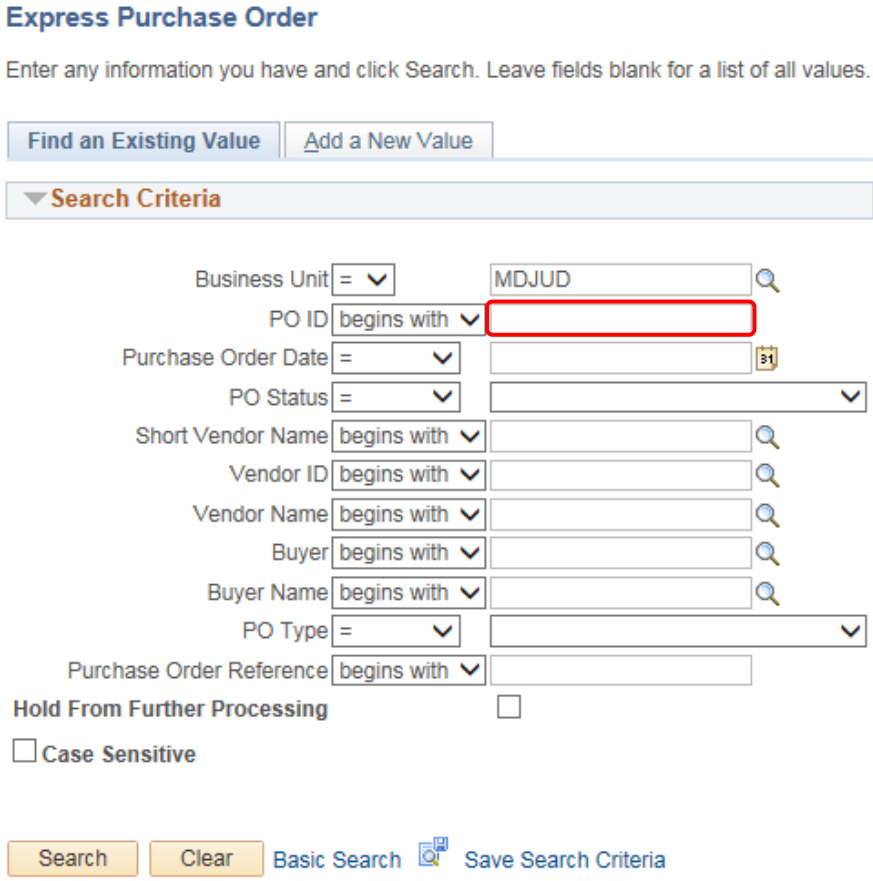
Task	Process Information
Cancelling an Express PO (Purchase Order)	Use this tip sheet to cancel an Express Purchase Order under the following circumstances: 1) The Express Purchase Order was entered by mistake 2) The Express Purchase Order is a duplicate 3) The Express Purchase Order is required to be canceled by the Purchasing organization. An Express Purchase Order must be in one the following states in order to be canceled: <u>An Express Purchase Order is allowed to be canceled when the PO Status is:</u> **'Approved'** (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. <u>An Express Purchase Order is NOT allowed to be canceled when the PO Status is:</u> 'Dispatched' or 'Approved' and it has had activity. The steps and messages will be different when cancelling an Express PO based on what status the Express PO is in prior to cancelling 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.

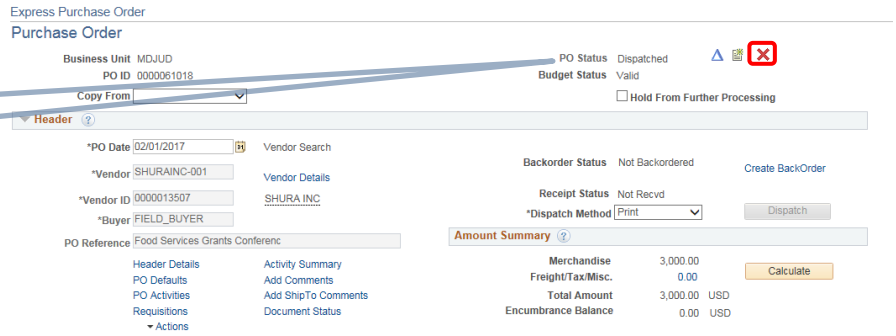
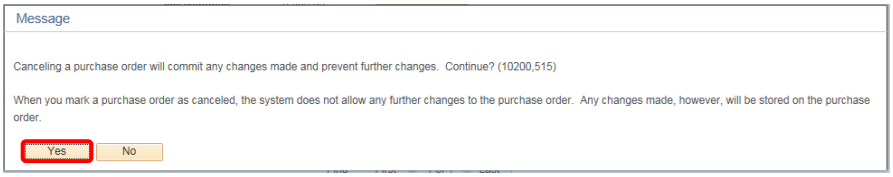
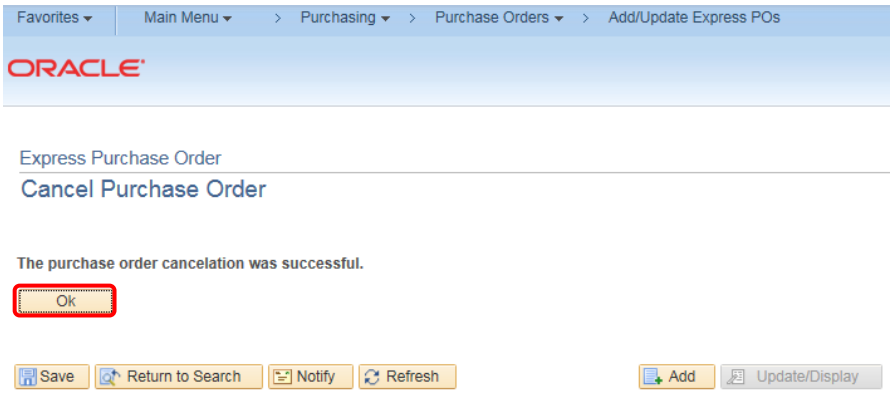
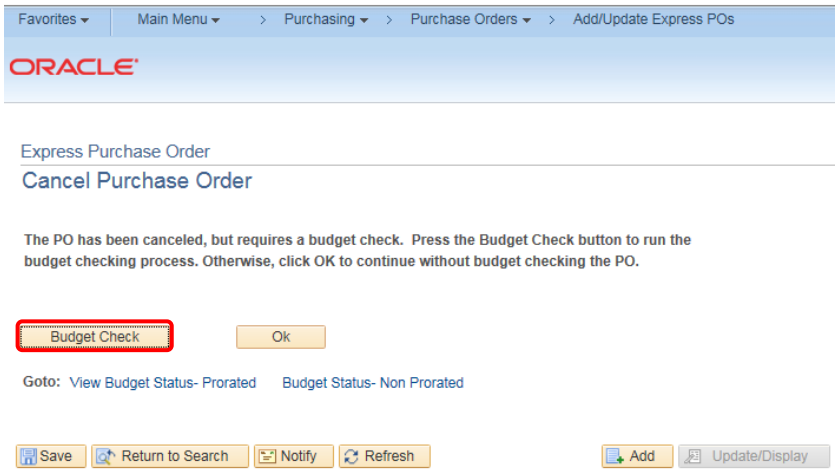
GEARS Navigation

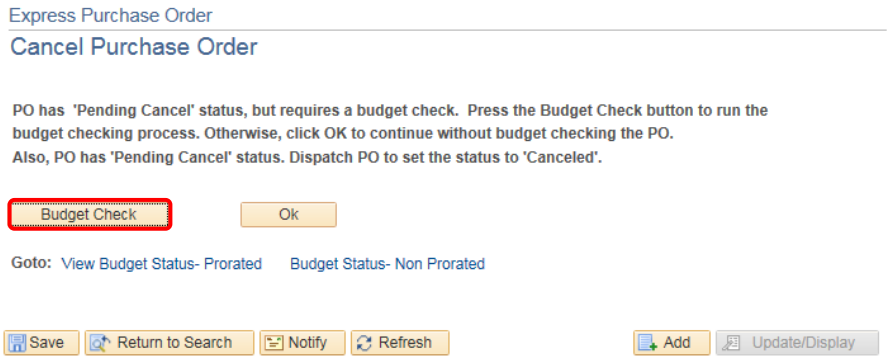
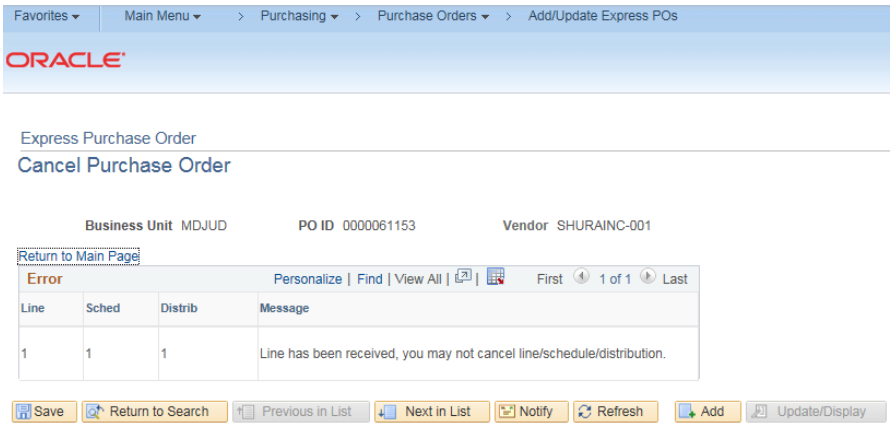
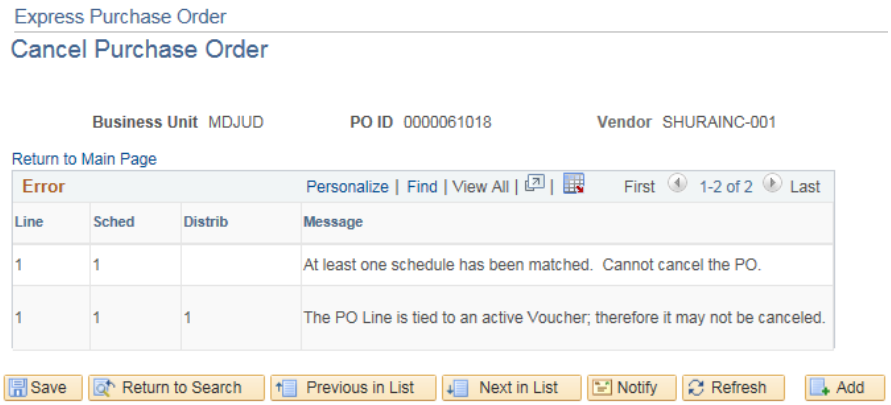
Main Menu> Purchasing > Purchase Orders > Add/Update Express POs	Favorites ▾ Main Menu ▾ › Purchasing ▾ › Purchase Orders ▾ › Add/Update Express POs

1.0 Process

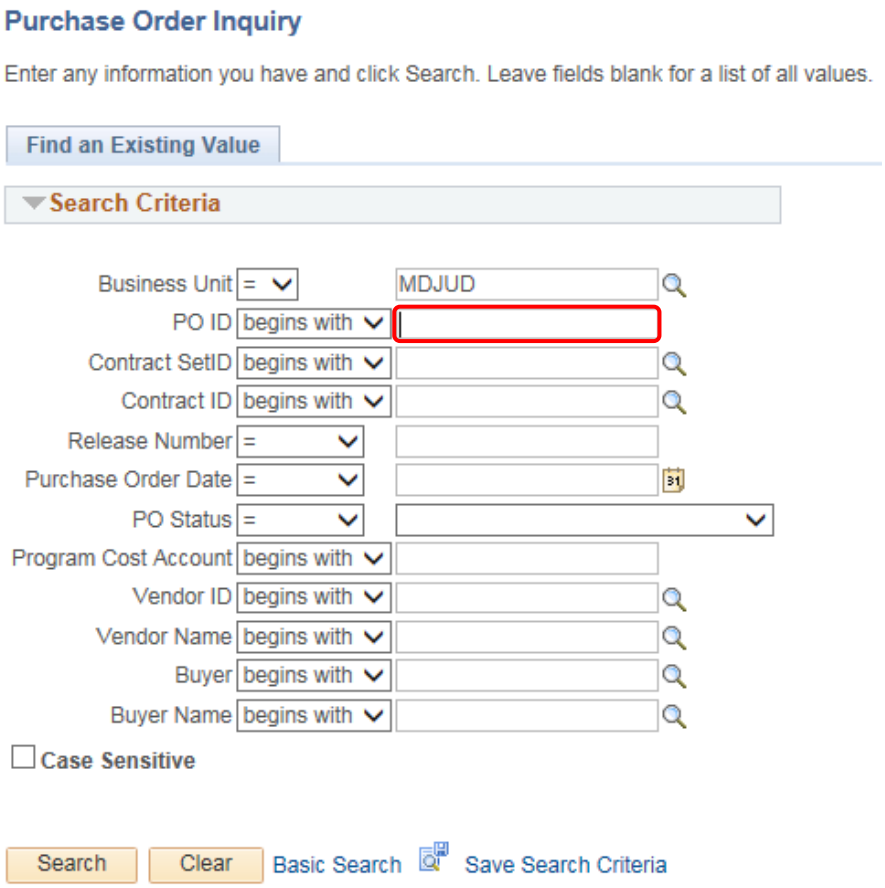
This document is intended to provide a quick reference to cancelling an Express Purchase Order within GEARS.

STEP	ACTION	DETAILS
1.	**Select the "Find an Existing Value" Tab**	
2.	**Enter you PO ID in the field PO ID:**	
3.	**Click the** **button.**	

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

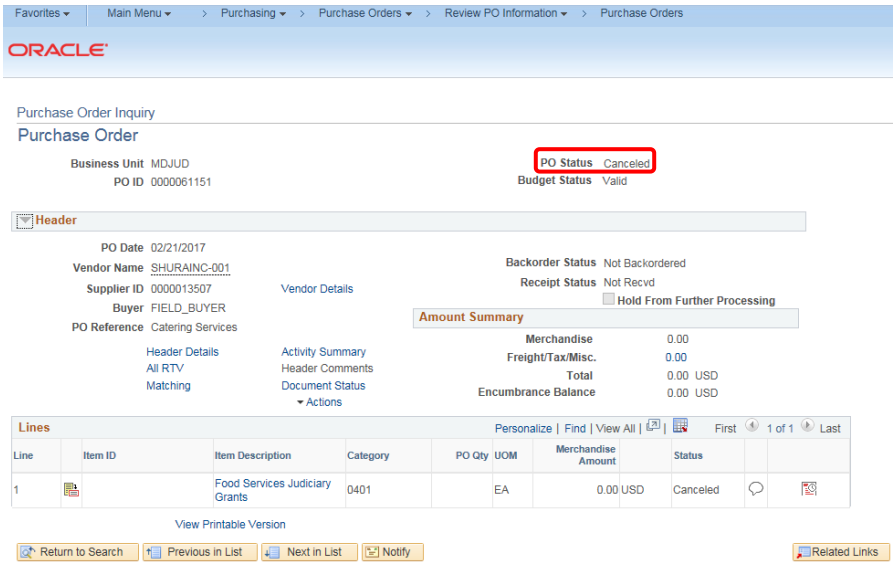
8.	**If your Express PO had a PO Status of <u>'Dispatched' but had NOT been received or vouchered</u>, then a message will be displayed explaining that the "PO has 'Pending Cancel' status, but requires a budget check."** **Click the Budget Check Button.**	
9.	**If your Express PO had a PO Status of <u>'Dispatched' and had been partially or fully received</u>, then a message will be displayed explaining that the "Line has been received, you may not cancel /line/schedule/distribution."** **NOTE: This Express PO cannot be canceled, unless the associated Receipts are cancelled.**	
10.	**If your Express PO had a PO Status of <u>'Dispatched' and had been tied to an active Voucher</u>, then a message will be displayed explaining that the "The PO Line is tied to an active Voucher, therefore it may not be cancelled."** **NOTE: This Express PO cannot be canceled, until all associated Vouchers and Receipts (if any) are cancelled.**	
11.	**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**	

12. **Enter the PO ID:**

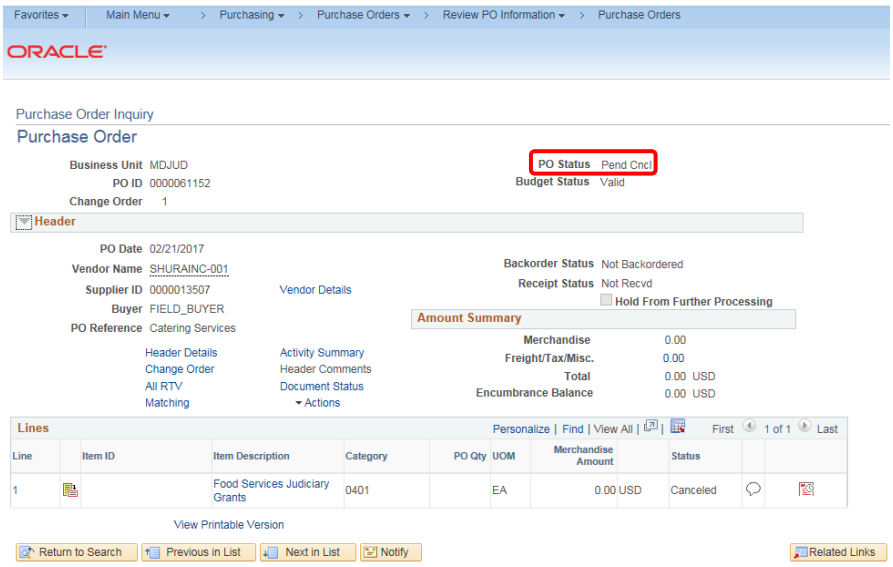


13. **Click the** Search **button.**

14. **If your Express PO had a PO Status of <u>'Approved'</u>, your Express Purchase Order will now have a <u>'Canceled'</u> PO Status.**

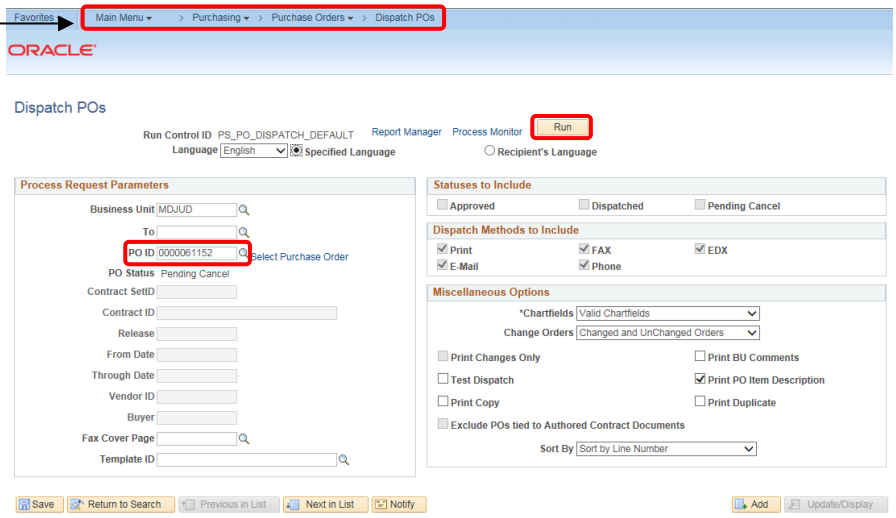


15. **If your Express Purchase Order had a PO Status of ‘Dispatched’, your Express Purchase Order will now have a ‘Pend Cncl’ (Pending Cancel) PO Status, until the Dispatch process is run.**



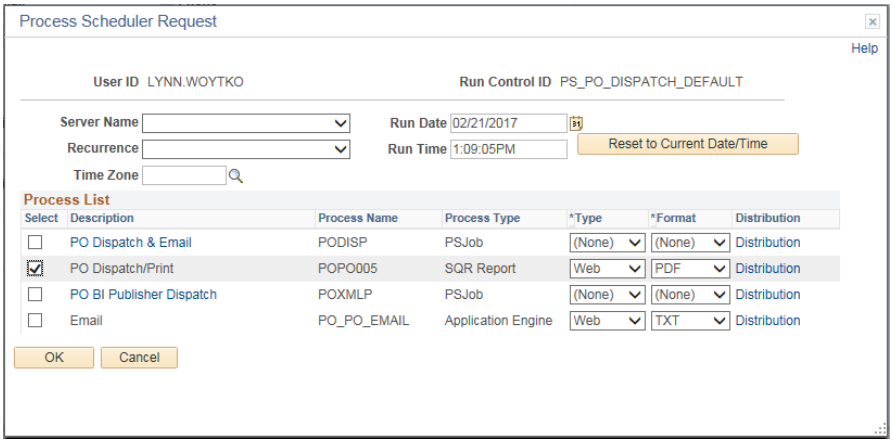
16. **Follow the navigation seen on the right to Dispatch your PO.**

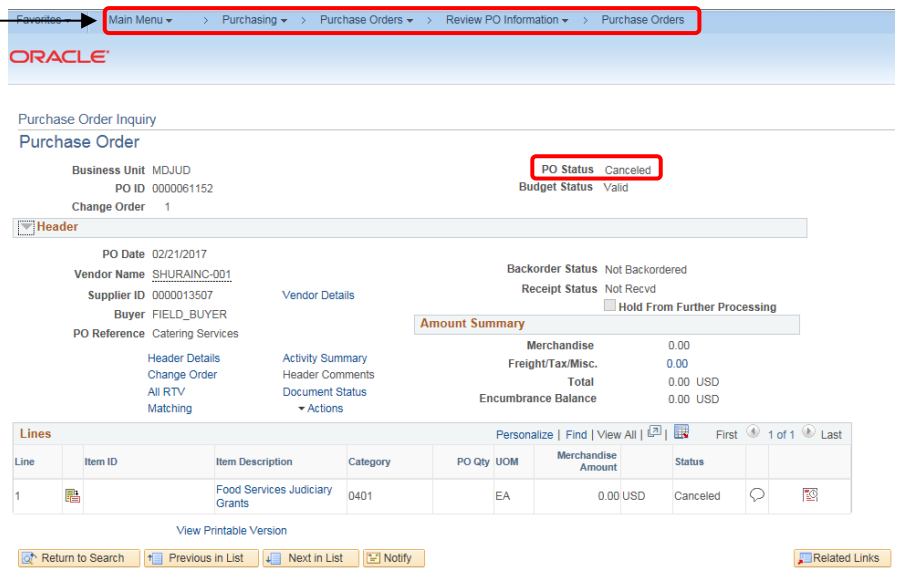
1. **Enter the PO # in the PO ID field.**
2. **Click** Run



17. **On the next page, choose PO Dispatch/Print.**

Then click OK



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

End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.