Cancelling a Purchase Order from the Requisition

Overview

• This job aid is intended for requisition creators who need to cancel an open PO that hasn’t been invoiced.

• Only the person listed on the requisition can perform these steps.
  o If the person listed left the University or will be gone for an extended period, please contact procurement_services@baylor.edu to request requisition reassignment to another person.

• Requisition creators can cancel a PO from the requisition only under these circumstances:
  o The PO is in an Open status
  o The PO hasn’t been invoiced.

• If the PO fits these circumstances but has a pending change order, the pending change order must be deleted first before it can be cancelled.

• Be sure that no shipments or invoicing are expected as it cannot be reopened.

• Please communicate the purchase order cancellation to the supplier. The system will not do it for you.

• Note the below POs can only be cancelled by Procurement:
  o Partially invoiced POs
  o POs closed for invoicing with funds remaining.
I. Navigate to Requisition Page

1. You can access the Purchase Requisitions task in two ways:
   a. (Option 1) Click the Navigator icon in upper left-hand corner of the Ignite landing page.
   ![Navigator Icon](image)
   
   b. Under the Procurement section, click the drop-down arrow and select Purchase Requisitions from the drop-down list.
   ![Procurement Dropdown](image)
   
   c. (Option 2) Under the Procurement heading on the home page, you can scroll down and click on the Purchase Requisitions tile.
   ![Procurement Home Page](image)
2. Cancel Purchase Order

1. Navigate to **Manage Requisitions**.

![Manage Requisitions](image)

2. Select the **requisition number** you wish to change. Click on the **order number** to check if the PO is open and hasn’t been invoiced. See **Step a** for features of a PO that hasn’t been invoiced.

![Manage Requisitions](image)
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a. A PO with no invoices applied will have these features:
   i. **Reserved** Funds Status
   ii. No **Invoiced** amount on the Order Life Cycle bar graph
   iii. No amounts for **Invoiced Quantity** and **Invoiced Amount** under the Schedules tab, which are column options via the View drop-down menu.

3. Select the **Actions** drop-down and click **Cancel Requisition** to cancel the associated PO(s) with the requisition.
4. On the pop-up, enter a reason for cancelling and select **OK**.

5. On the confirmation pop-up, select **OK**. The cancellation has now been submitted.

6. Give the system a couple of minutes to process the change. Then, you can check the PO again to confirm cancellation.