

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.
 - 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:
 - The PO is in an **Open** status
 - 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.
- **It is the end user responsibility to contact the supplier to cancel the order and obtain confirmation of the cancellation. The system does not notify the supplier.**
- Note the below POs can only be cancelled by Procurement:
 - Partially invoiced POs
 - POs closed for invoicing with funds remaining
 - POs whose requisitions have open amounts that will be resourced into other POs.
 - Marketplace orders do not get resourced into new POs.

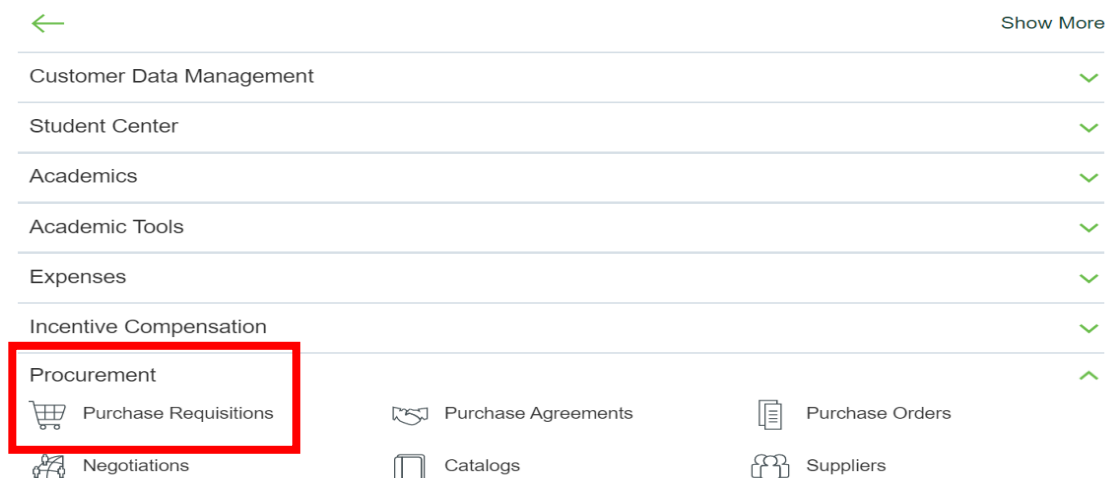
Cancelling a Purchase Order from the Requisition

I. Navigate to Requisition Page

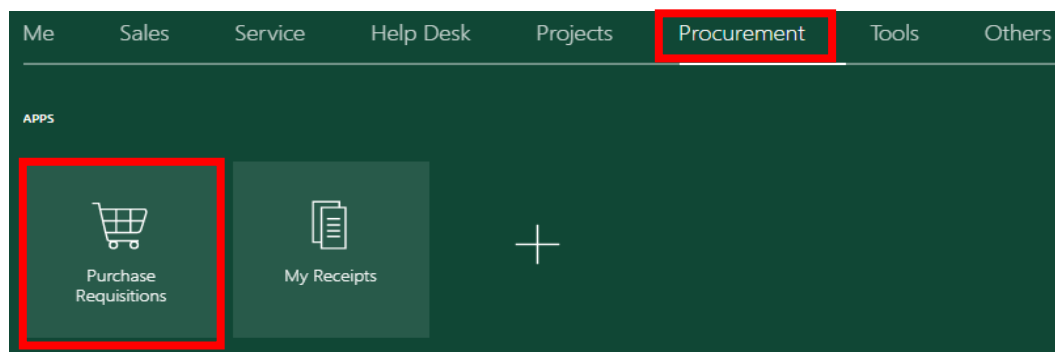
- I. You can access the **Purchase Requisitions** task in two ways:
 - a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



- c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



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2. Cancel Purchase Order

I. Navigate to Manage Requisitions.

Requisitions More Tasks ▾ **Manage Requisitions**

Search

Recent Requisitions		View More
REQ0000530	Lab Chemicals	Pending approval
REQ0000527	chairs for new employees	Pending approval
REQ0000520	Royalties	Approved
REQ0000518	Dell Standard 19 Inch Monitor	Pending approval
REQ0000517	Dell Standard 19 Inch Monitor	Pending approval

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 [?](#) **Done**

Search

Advanced | **Manage Watchlist** | Saved Search | Requisitions I Entered ▾

** At least one is required

Requisitioning BU

** Entered By

** Requisition

Description

Created

Status

Requester

** Supplier

Order

** Item

Requisitions Requiring Attention

Search Reset Save...

Search Results

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ0084663	Music for symphonic band for spring semester.	01/13/2022	297.66 USD	Approved	Liquidated	ORD0055818

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- a. A PO with no invoices applied will have these features:
 - i. A **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 can be added as columns via the View dropdown menu.

Purchase Order: ORD0055818

View PDF Actions Refresh Done

General

Procurement BU: BAYLOR	Supplier: J. W. Pepper & Son Inc	Ordered: 297.66 USD
Requisitioning BU: BAYLOR	Supplier Site: PPO_Boo_842	Total Tax: 0.00 USD
Sold-to Legal Entity: Baylor University	Supplier Contact:	Total: 297.66 USD
Bill-to BU: BAYLOR	Communication Method: E-Mail	Description: Music for symphonic band for spring semester
Order: ORD0055818	Email: orders@jwpepper.com	Requisition: REQ0084663
Status: Open	Bill-to Location: Accounts Payable Office	Source Agreement:
Funds Status: Reserved	Ship-to Location: Rory Grove Hall	Supplier Order:
Buyer: Mickey Cochran		
Creation Date: 01/20/2022		

Terms

Required Acknowledgment: None	Shipping Method: ---	Pay on receipt
Payment Terms: Net 30	Freight Terms: None	Confirming order
	FOB: None	

Additional Information

TCM Number:

Schedules

Line	Description	Location	Requested Delivery Date	Promised Delivery Date	Quantity	UOM	Status	Funds Status	Accrue at Receipt	Total	Invoiced Quantity	Invoiced Amount
1	El baile de Luis Alonso Geronimo Gimenez Band Set & Score	Rory Grov...	01/13/2022	01/13/2022	1	EA	Open	Reserved	---	149.00	0	0
2	La boda de Luis Alonso Geronimo Gimenez Band Set & Score	Rory Grov...	01/13/2022	01/13/2022	1	EA	Open	Reserved	---	135.67	0	0

3. Select the **Actions** dropdown and click **Cancel Requisition** to cancel the associated PO(s) with the requisition.

ignite Release Regression Testing

Requisition: REQ0084663

Requisitioning BU: BAYLOR	Creation Date: 01/13/2022
Entered By: Ashley Davis	Status: Approved
Description: Music for symphonic band for the spring semester.	Justification: Music ordered for symphonic band for the spring semester requested by Isaiah Odajima. Send PO to orders@jwpepper.com

Check Funds View Life Cycle Actions Done

- Duplicate
- Cancel Requisition
- Reassign
- View Document History
- View PDF
- Edit Order

Requisition Lines

Line	Item	Description	Category Name	Quantity	UOM
1		El baile de Luis Alonso Geronimo Gimenez Band Set & Sco...	Books, Movies, and Music	1	EA
2		La boda de Luis Alonso Geronimo Gimenez Band Set & Sc...	Books, Movies, and Music	1	EA
3		Shipping and Handling	Shipping		

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4. On the pop-up, enter a reason for cancelling and select **OK**.

Cancel Requisition ✕

* Reason

OK **Cancel**

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

Confirmation ✕

The requisition lines were canceled or cancellation requests were submitted for the lines.

OK

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

Requisition: REQ0084663 ? Check Funds View Life Cycle Actions Done

Requisitioning BU BAYLOR
Entered By Ashley Davis
Description Music for symphonic band for spring semester

Creation Date 01/13/2022
Status Approved
Justification Music ordered for symphonic band for the spring semester requested by Leahh Orlajma. Send PO to orders@jwpepper.com

Requisition Amount 297.66 USD
Approval Amount 297.66 USD
Funds Status Liquidated
Attachments JW Pepper Quote Symphonic Band

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order
1		El baile de Luis Alonso Geronimo Gimenez Band Set & Sco...	Books, Movies, and Music	1	EA	140.00 USD	140.00	Approved	Liquidated	ORD0055818 ?



Purchase Order: ORD0055818 ?

View PDF Actions

Main

General

Procurement BU	BAYLOR	Supplier	J. W. Pepper & Son Inc	Ordered	0.00 U
Requisitioning BU	BAYLOR	Supplier Site	PO_Box_642	Total Tax	0.00 US
Sold-to Legal Entity	Baylor University	Supplier Contact		Total	0.00 U
Bill-to BU	BAYLOR	Communication Method	E-Mail	Description	Music f for spri
Order	ORD0055818	Email	orders@jwpepper.com	Requisition	REQ00
Status	Canceled	Bill-to Location	Accounts Payable Office	Source Agreement	
Funds Status	Liquidated	Ship-to Location	Roxy Grove Hall	Supplier Order	
Buyer	Mickey Cochran				
Creation Date	01/20/2022				