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.
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]

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

   ![Procurement Drop-down]

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

1. Navigate to **Manage Requisitions**.

![Image of Manage Requisitions interface]

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.

![Image of Manage Requisitions interface with requisition number highlighted]
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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.

3. Select the **Actions** dropdown 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**.

![Cancel Requisition](image)

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

![Confirmation](image)

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

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

![Purchase Order](image)