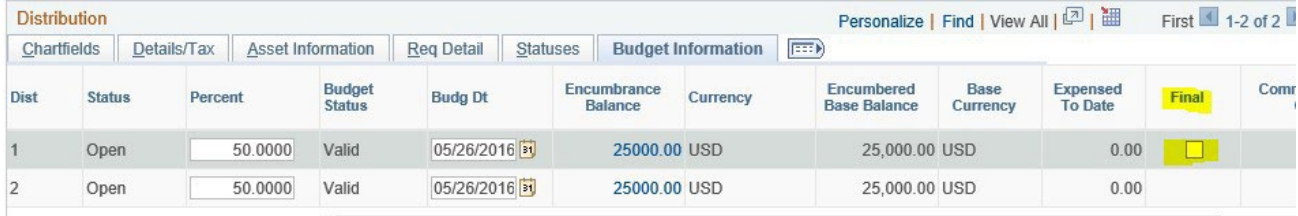



How to Un-Finalize PO & Return Un-Sourced Qty/Amt to Requisition

Use this document to Un-Finalize an active PO or individual PO Distribution Line(s) sourced from one or more requisitions. Following these steps will ensure requisition quantities or amounts previously liquidated by the Finalize action are reinstated and made available for sourcing to a PO.

Step	Description
1.	Sign into PeopleSoft
2.	Navigate to Home Page > Procurement Tile > Add/Update POs
3.	<p>Search for previously finalized PO ID</p> <p>Purchase Order Enter any information you have and click Search. Leave fields blank for a list of all</p> <p>Find an Existing Value Add a New Value</p> <p>▼ Search Criteria</p> <p>Business Unit: = 41400 × 🔍 PO Number: begins with 0000096347 Origin: begins with 🔍 Purchase Order Date: = 🔍 PO Status: = 🔍 Short Vendor Name: begins with 🔍 Vendor ID: begins with 🔍 Name 1: begins with 🔍 Buyer: begins with 🔍 Purchase Order Reference: begins with 🔍</p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p>
4.	<p>Options for taking the Finalize action include:</p> <ul style="list-style-type: none"> ➤ Un-Finalize the PO Header by clicking the 'Undo Finalize Entire Document' icon to reinstate quantities/amounts on all open requisition lines liquidated when the PO was finalized. <p>Maintain Purchase Order</p> <p>Purchase Order</p> <p>Business Unit: 41400 PO Status: Approved ✖ PO ID: 0000096347 Budget Status: Valid 📄 📄</p> <p>If this option is chosen, the message below will display indicating the Undo Finalize option will effect all eligible/open distributions on the PO:</p> <div data-bbox="293 1633 1057 1843" style="border: 1px solid gray; padding: 10px;"> <p>Message</p> <p>This action will undo finalize all eligible distributions for this PO. Continue? (10200,336)</p> <p style="text-align: right;">Yes No</p> </div>

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Step	Description
	<p>Or</p> <p>➤ Un-Finalize a specific PO Distribution line by un-checking the 'Final' checkbox to reinstate quantities/amounts only on the requisition linked on the distribution line.</p>  <ul style="list-style-type: none"> Click Ok, then Save
5.	<p>Budget Check PO to complete the Un-Finalize process</p> <p>Maintain Purchase Order</p> <p>Purchase Order</p> <p>Business Unit: 41400 PO ID: 0000096347</p> <p>PO Status: Approved Budget Status: Not Chk'd</p> 
6.	<p>Once Un-Finalize is complete, the requisition(s) associated with the Un-Finalized PO or PO Distribution line are once again available for sourcing of any non-sourced quantities or amounts.</p> 