

9.2.38

Purchasing

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 People	Soft	<u> </u>							
2.	Navigate to Home Page > Procurement Tile > Add/Update POs									
3.	Search for previously finalized PO ID									
	Purchase Order									
	Enter any information you ha	ave and click Search. Leave fields bla	ank for a list of all							
	Find an Existing Value	Add a New Value								
	Business Unit:	= > 41400	×Q							
	PO Number:	begins with > 0000096347	``							
	Origin:	begins with \checkmark	Q							
	Purchase Order Date:		31							
	Short Vendor Name:	begins with V	Q							
	Vendor ID:	begins with V	Q							
	Name 1:	begins with \checkmark								
	Buyer: Burchase Order Reference	begins with ~	Q							
		c. Degins with V								
		Desis Oceants 📼 Ocean Oceants Ocideus								
	Search	asic Search 📳 Save Search Unter	na							
4.	Options for takir	ng the Finalize action	include:							
			, alial sing tha filmda Fina	lize Entire Decument	l'inne to voinnte	4-				
	Un-Final quantities	Ize the PO header by	requisition lines liquida	ted when the PO way	r icon lo reinsia s finalized	le				
	quantities	sanounts on all open			s illializeu.					
	Maintain Purchase O	rder								
	Purchase Order									
	Business Unit:	41400		PO Status:	Approved	×				
	PO ID:	0000096347		Budget Status:	Valid	fii 🕞				
	If this option is a	hosen the message	e below will display in	dicating the Undo F	- - inalize ontion	will effect				
	all eligible/open	distributions on the			manze option	will effect				
			10.							
				_						
	Message									
	M									
	This action will undo finalize all eligible distributions for this PO. Continue? (10200-336)									
	St			í 📕						
	15		Yes No							
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Step	Description														
	 Or Un-Finalize a specific PO Distribution line by un-checking the 'Final' checkbox to reinstate guantities/amounts only on the requisition linked on the distribution line. 														
	Distribution Personalize Find View All 2 1 First P									First 🚺 1-2	of 2				
	Chartfields Details/Tax Asset Information Req Detail							Budget I	nformation						
	Dist	Status	Percei	nt	Budget Status	Budg	Dt	Encumbrance Balance	Currency	Encum Base B	nbered alance	Base Currency	Expensed To Date	Final	Comr
	1	Open		50.0000	Valid	05/26/2016 🛐		25000.00	USD	25,000.00		USD	0.00		
	2	Open 50.0000 Valid 05/26/2016		6/2016 🛐	25000.00	2	25,000.00 USD		0.00						
5.	Budget Check PO to complete the Unit Maintain Purchase Order Purchase Order Business Unit: 41400 PO ID: 0000096347				ie Un	-Finalize	inalize process				A	pproved lot Chik'd	rq fi .	× P	
6.	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. Select Requisition Lines Personalize Find V Sourcing Requisitions Change Vendor											ion 1d \			
	Include	Include Vendor ID *Vendor				Vendor Location	n PO Qty PO UOM Item			m Description			Req ID▼		
		0	00000824	45 Q	WWGRAING	ER	000001	1.0000	EA 🔍	a t	test final	ize distrib lin	e	0000017668	1