

Overview

This document explains how buyers can find, edit, issue, cancel, and close individual lines of purchase orders (POs); create change orders; and amend supplier contracts.

When determining the appropriate process for making revisions to a PO, consider the following:

- POs can be edited when their status is **Draft**, **In Progress**, or **Approved**. The **Edit** function allows for the revision of all PO data.
- Once a PO has moved into **Issued** status, it can no longer be edited. Any changes to the lines of the PO require a **Change Order**.
- After the PO has been issued, the **Edit Purchase Order Without Change Order** function allows for changes to only Header information (e.g., PO Type, Payment Terms, Buyer, Contact Information) on the PO, or the Deliver To/Ship To information on the lines of the PO.
- The **Cancel** function will cancel the PO and reopen the requisition for sourcing.
- Closing the PO or closing the PO line will close the PO and the requisition and relieve all encumbrances.
- For information about closing POs, please refer to the Procurement Events job aid.

Note: If the wrong supplier was selected and the PO was issued, the PO must be canceled to issue a new PO to the correct supplier.

Recommendations:

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- None.

Icons Referred to in This Document



Required Field



Add Row



Prompt



Related Actions



Calendar



Check Box

Find Purchase Order

1. Enter **Find Purchase Orders** in **Search** bar and select the report.

2. The Find Purchase Order pop up displays.
 3. Use the **Company Prompt** and select your institution.
 4. (Optional) Fill in the remaining fields as necessary to limit the Purchase Orders found in the report.
- Note:** You can leave all report prompts blank and select OK to pull all current Purchase Orders.

Find Purchase Orders

Company

x UM29 Salisbury University (SU)

...

:

Supplier

:

Order-From Connection

:

Buyer

:

Purchase Order Type

x IT Supplies and Equipment

...

:

Purchase Order

:

Document Date On or After

12/01/2023

Document Date On or Before

01/15/2024

Due Date On or After

MM/DD/YYYY

Due Date On or Before

MM/DD/YYYY

Status

x Approved

x In Progress

x Issued

:

Issue Options

:

Contract

:

OK

Cancel

5. Select **OK**.
6. The Find Purchase Orders report displays.
7. Select the **Magnifying Glass** to see details on the purchase order.

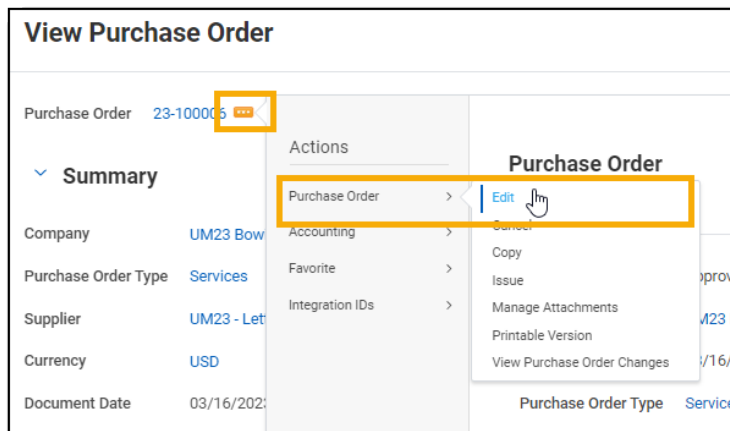
Purchase Orders 3 items	
Purchase Order	Number
	23-100006
	23-100007
	23-100008

- The Purchase Order displays.

Note: You can check the status of the Purchase Order and select **related actions** next to the Purchase Order number by hovering over the Purchase Order number and selecting the following: edit, cancel, and issue Purchase Order.

Edit Purchase Order

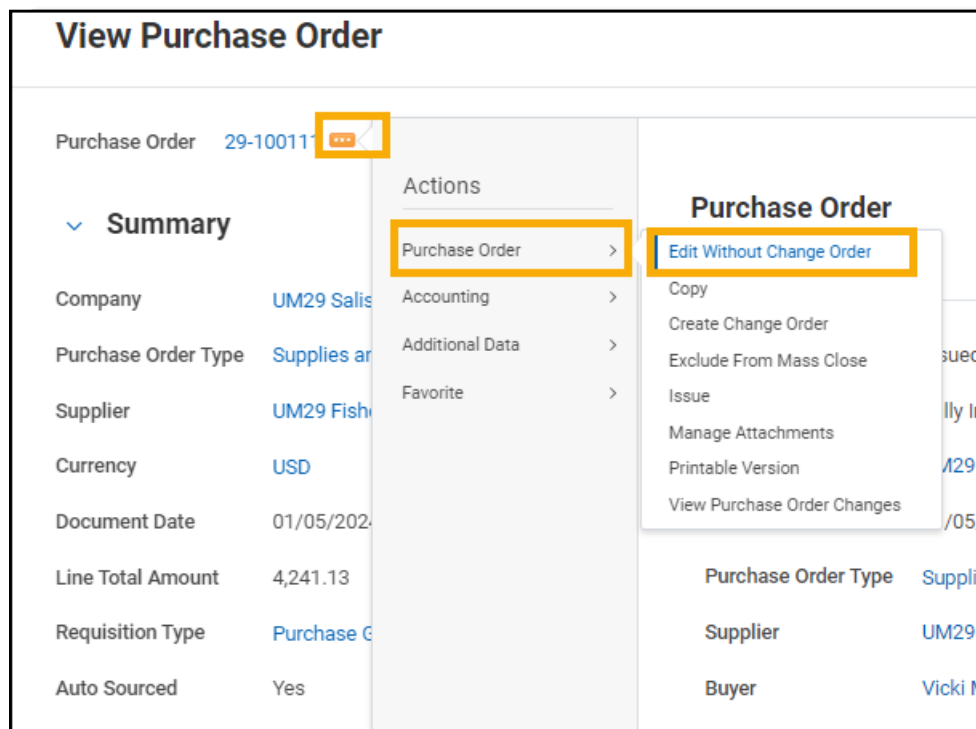
- Enter the specific **Purchase Order** Number in the **Search** bar and select the Purchase Order.
- The View Purchase Order page displays.
- Select **Related Actions** by hovering over the purchase order number, choose **Purchase Order**, then select **Edit**.



- The Edit Purchase Order page displays.
- Review and edit the PO data as needed.
- Select **Submit**.

Edit Purchase Order without Change Order

1. Enter the specific **Purchase Order** Number in the **Search** bar and select the Purchase Order.
Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order number, choose **Purchase Order**, then select **Edit without Change Order**.



View Purchase Order

Purchase Order 29-10011

Summary

Company	UM29 Salis
Purchase Order Type	Supplies ar
Supplier	UM29 Fish
Currency	USD
Document Date	01/05/202
Line Total Amount	4,241.13
Requisition Type	Purchase C
Auto Sourced	Yes

Actions

- Purchase Order >
- Accounting >
- Additional Data >
- Favorite >

Purchase Order

- Edit Without Change Order
- Copy
- Create Change Order
- Exclude From Mass Close
- Issue
- Manage Attachments
- Printable Version
- View Purchase Order Changes

Purchase Order Type Supplies

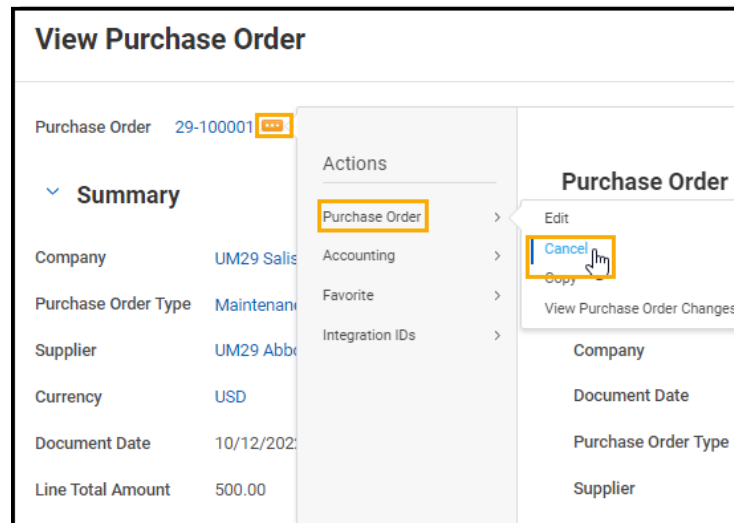
Supplier UM29

Buyer Vicki M

4. The Edit Purchase Order page displays.
5. Review and edit the PO data as needed.
6. Select **Submit**.

Cancel Purchase Order

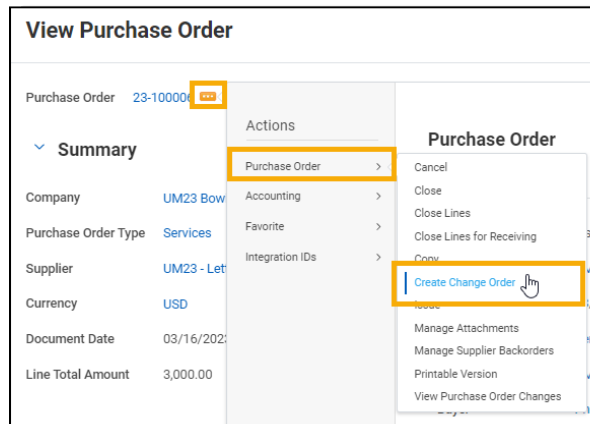
1. Enter the specific **Purchase Order Number** in the **Search** bar and select the Purchase Order.
Note: If you do not know the Purchase order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order name.
4. Select **Purchase Order** under **Actions** and choose **Cancel**.



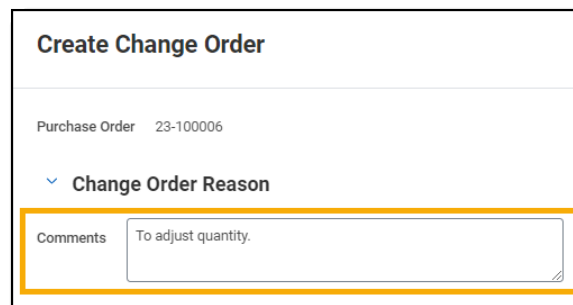
5. The Cancel Purchase Order page displays.
6. Review the following information on the Cancel Order Page.
7. Select **OK**.

Change Order

1. Enter the specific **Purchase Order Number** in the **Search** bar and select the Purchase Order.
Note: If you do not know the Purchase number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order name.
4. Select **Purchase Order** under **Actions** and choose **Create Change Order**.



5. The Change Order Reason page displays.
6. Under Change Order Reason enter **Comments**.



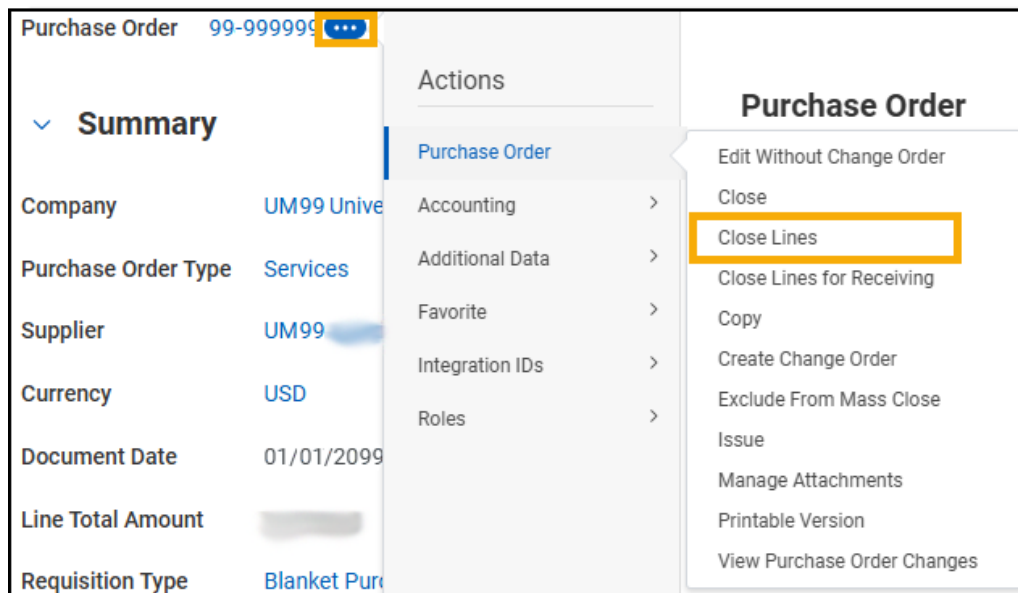
7. Apply edits accordingly on the Create Change Order page.
8. Select **Submit**.

Notes:

- Change Orders will route for Budget Check if the Purchase Order Value was modified.
- You will receive a notification of approval or denial.
- Once you receive approval, you must **Issue** the Purchase Order again.

Close Lines

1. Enter the specific **Purchase Order** Number in the **Search** bar and select the Purchase Order.
Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** next to the Purchase Order number, choose **Purchase Order**, then select **Close Lines**.



Purchase Order 99-999999

Summary

Company: UM99 University

Purchase Order Type: Services

Supplier: UM99

Currency: USD

Document Date: 01/01/2099

Line Total Amount: [blurred]

Requisition Type: Blanket Purchase Order

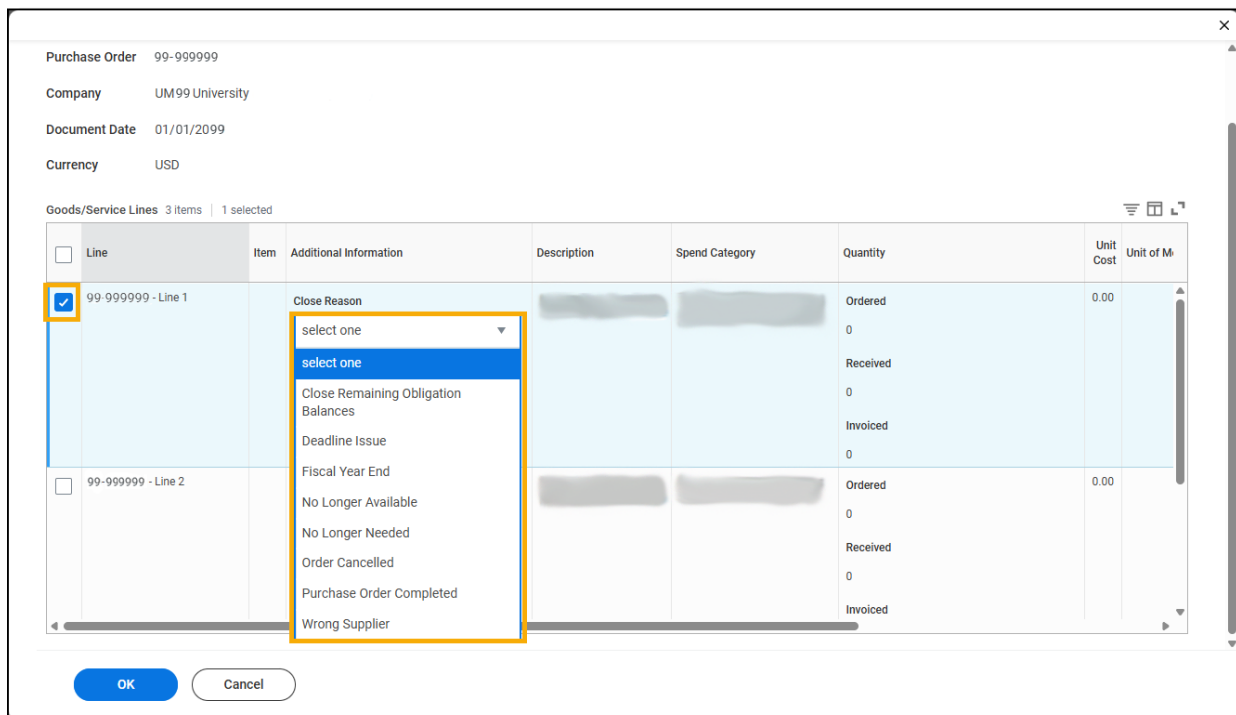
Actions

- Purchase Order
- Accounting
- Additional Data
- Favorite
- Integration IDs
- Roles

Purchase Order

- Edit Without Change Order
- Close
- Close Lines**
- Close Lines for Receiving
- Copy
- Create Change Order
- Exclude From Mass Close
- Issue
- Manage Attachments
- Printable Version
- View Purchase Order Changes

- The Close Lines page displays.
- Use the **check box** to select a Purchase Order line to close.
- Use the **Close Reason prompt** and select the appropriate reason for closing the line.
- Repeat steps 5 and 6 for each line requiring closure.
- Select **OK**.



Purchase Order 99-999999

Company: UM99 University

Document Date: 01/01/2099

Currency: USD

Goods/Service Lines: 3 Items | 1 selected

Line	Item	Additional Information	Description	Spend Category	Quantity	Unit Cost	Unit of Measure
☒	99-999999 - Line 1	Close Reason	[blurred]	[blurred]	Ordered 0	0.00	
☐	99-999999 - Line 2	[blurred]	[blurred]	[blurred]	Ordered 0	0.00	

Close Reason

- select one
- select one
- Close Remaining Obligation
- Balances
- Deadline Issue
- Fiscal Year End
- No Longer Available
- No Longer Needed
- Order Cancelled
- Purchase Order Completed
- Wrong Supplier

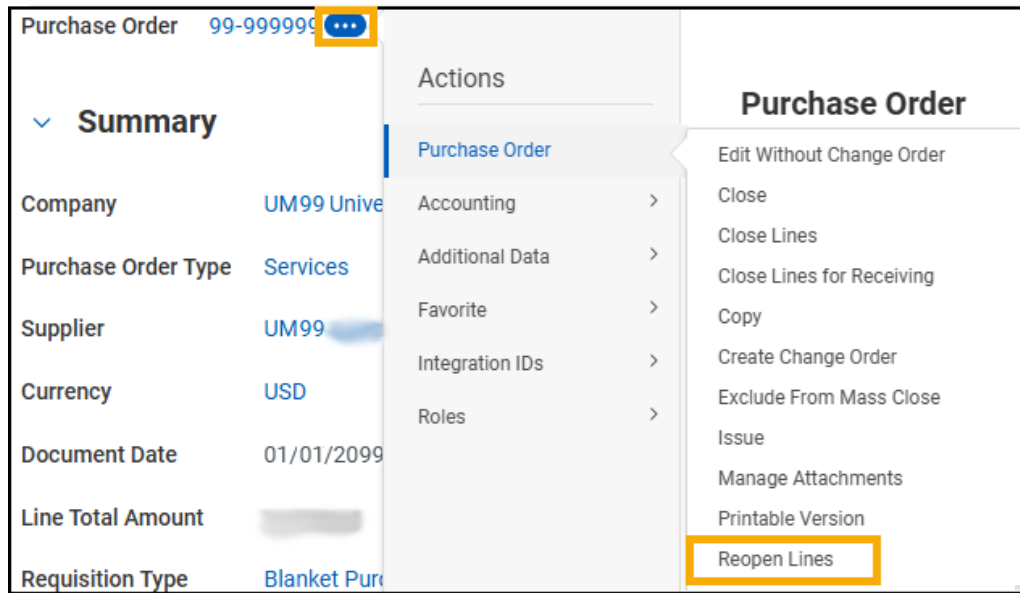
OK Cancel

- Select **Done**.

Note: The Purchase Order now displays the line as Closed in the Status field.

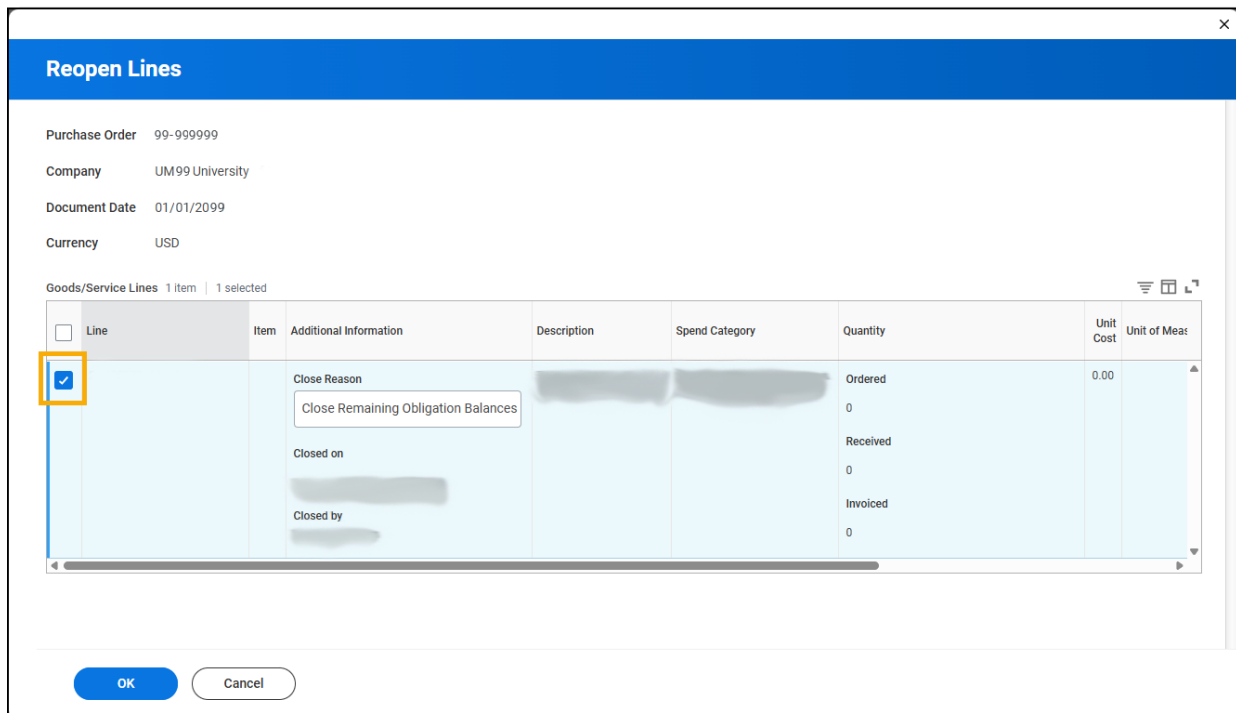
Reopen Line

1. Enter the specific **Purchase Order** Number in the **Search** bar and select the Purchase Order.
Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** next to the Purchase Order number, choose **Purchase Order**, then select **Reopen Lines**.



The screenshot shows the 'View Purchase Order' page for Purchase Order 99-99999. The 'Summary' section on the left lists details: Company (UM99 Unive), Purchase Order Type (Services), Supplier (UM99), Currency (USD), Document Date (01/01/2099), Line Total Amount, and Requisition Type (Blanket Pur). A 'Related Actions' menu is open next to the Purchase Order number, showing options like Accounting, Additional Data, Favorite, Integration IDs, and Roles. The 'Purchase Order' dropdown menu is also open, displaying options such as 'Edit Without Change Order', 'Close', 'Close Lines', 'Close Lines for Receiving', 'Copy', 'Create Change Order', 'Exclude From Mass Close', 'Issue', 'Manage Attachments', 'Printable Version', and 'Reopen Lines'. The 'Reopen Lines' option is highlighted with a yellow box.

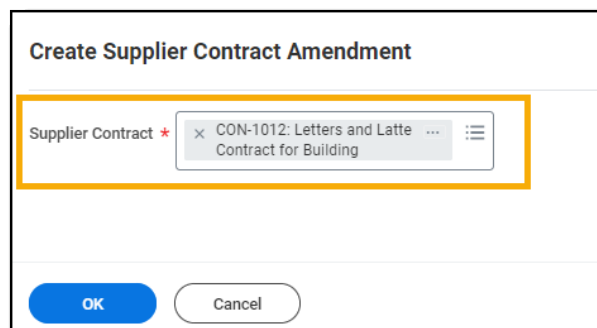
4. The Reopen Lines page displays.
5. Use the **check box(es)** to select the line(s) to reopen.
6. Select **OK**.



7. Select **Done**.

Create Supplier Contract Amendment

1. Enter **Create Supplier Contract Amendment** in the **Search** bar and select the task.
2. The Create Supplier Contract Amendment popup displays.
3. **Supplier Contract**: use the **Prompt** to select the **Supplier Contract**.



4. Select **OK**.
5. The Create Supplier Contract Amendment page displays.
6. Fill in the following fields under the **Amendment Information** section:



FIN: Editing Purchase Orders and Creating Change Orders

- a. **Amendment Type:** use the **Prompt** to select **Amendment Type**.
 - b. **Amendment Date:** auto populates.
 - c. **Amendment Number:** enter the **Amendment Number**.
7. Enter or edit the **Supplier Contract Details** as needed on the Create Supplier Contract Amendment page.
Note: Some fields will be automatically populated with the original supplier contract details.
8. Select **Submit**.