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Objectives

- Review UH Policy and Recommendations
- Review POA General Processing Steps
- Search for a Purchase Order
- Process a POA Before Payment
- Process a POA After Payment
- Use the Retransmit to Reprint the Purchase Order
- Void a Purchase Order

Resources

All of the materials covered in this workshop are also covered in the online tutorials http://www.hawaii.edu/kualifinancial/?page=training. This online tutorial can be useful before or after training in case you want to get a head start or you just need a refresher. You can also review the Process Documents for each business process to get a finer level of detail related to each topic.
Purchase Order Amendment

General – UH policy

Purchase order changes serve as formal notification to the vendor of changes to previously issued purchase orders and are intended to clarify and update the order specifications, thereby minimizing potential liability to University departments and personnel relating to the order. For more detailed information regarding University policies on purchase order changes see Administrative Procedures A8.250, Section 15, Purchase Order Changes, and A8.275, Section 4a, Encumbrance of Contracts beyond the Fiscal Officer's Purchasing Authority.

Examples of conditions which would call for the issuance of a purchase order amendment to the vendor include:

a) Increase or decrease in quantity;
b) Significant increase in total dollar amount;
c) Changes to purchase orders issued by OPRPM
d) Changes to purchase order which result in a purchase which exceeds the limits of a fiscal officer's purchasing authority;
e) Changes which would significantly alter the original specifications of the item(s) to be purchased or would significantly modify the terms of the purchase;
f) Significant changes in delivery date or method of delivery;
g) Partial or total cancellation of order.

Purchase order amendments should not be used to change the vendor with whom a department is doing business or to add new items to the purchase order.
Training Guide

General – KFS Purchase Order Amendment Features

In KFS, the Purchase Order Amendment e-doc enables users to:

a) generate a change order document based on the original PO specifications and format,

b) edit fields, as needed, in various tabs such as Document Overview, Delivery, Vendor (except vendor name), Items (including item and accounting lines), Capital Asset and Additional Institutional Info,

c) route the PO Amendment to individuals who must approve the change(s), and

d) print a PO Amendment output document for signature and issuance to the vendor.

Additionally, similar to the legacy ePurchasing, Change Order feature, the KFS Purchase Order Amendment (POA) document may be created by anyone with general user access to KFS and then follows a workflow which allows appropriate authorities to approve the POA as required by UH policies.
POA ROUTING

The diagram below notes the standard workflow for the Purchase Order Amendment process.
POA System Processing Rules

When processing a PO Amend document, the following system rules should be kept in mind:

- **To initiate a PO Amend document, user must select version of the PO in 'Open' status.**

- **During the amend process, the original PO will have a document status of 'pending amendment' and the newly created document will have a status of 'change in process'. After the amendment has been submitted, the original document status changes to 'retired version' and the amendment's status changes to 'open' after the POA has been fully approved.**

- **The system will add a note in the NOTES AND ATTACHMENTS tab with the date the amendment was started, the person who started the amendment, the information entered when user was prompted to 'confirm' desire to proceed with POA, and the previous PO e-doc number.**

**Prior to Payment Processing:**

- Most fields which were available for editing on the initial PO document may also be edited on the PO Amend document with the following exceptions:
  - The fiscal year cannot be changed.
  - The Vendor's Name and Number cannot be changed.
  - The Item Type cannot be changed (from 'QTY' to 'NO QTY' or 'NO QTY' to 'QTY').

- You may edit current line items, edit or add account lines on current line items, add new line items, delete newly added items, and otherwise perform all other edits.

- New line items can always be added but should be done so in accordance with the UH policies on changes to POs.

- CAMS data can always be changed.
• There must be at least one line item when the POA is submitted.

• **Once Payment Processing has been initiated the following limitations on changes apply:**
  
  • If modifying an existing line item the amount cannot go below what has already been invoiced.
  
  • If PREQ is in Final Status the PO can be amended repeatedly but the accounting lines for line items that have payments against them cannot be edited, including inserting additional accounting lines.
  
  • If there are payment requests (PREQs) or vendor credit memos (CMs) in process, the **amend** button is not displayed.
  
  • If a Payment Request (PREQ) or credit memo (CM) has been submitted but the check has not yet been processed against a line item, that line item cannot be changed.
  
  • Users are not allowed to create payment requests or credit memos against a PO that has a pending amendment.
  
• **Note:** The system runs an automatic batch cycle each month to close out POs with no encumbrance.
UH Procedural Recommendations

- IMPORTANT: Baseline PURAP does not assign a sequential count number for each new PO Amend document processed, e.g., Amendment # 1, Amendment # 2, etc. Therefore, it is recommended that OPOs manually assign sequential Amendment numbers to each POA processed and that the applicable Amendment number be entered in the NOTES TO VENDOR field of the POA document. See example below under the “Initiating a POA Document, VENDOR” section.

- The “void order” button is available if no payments have been made. However, UH is recommending that the “void order” option only be used if the order has not yet been placed with the vendor (e.g., an error was found on a PO that was fully approved, but the hardcopy has not been mailed out to the vendor yet).

- For cancellation of a PO after the order has been sent to the vendor, UH is recommending use of the following guidelines:
  - If the entire order must be cancelled and no payments have yet been made:
    - Reduce all unit costs to $0.00 (by entering “0.00” in the Unit Cost field).
    - In BOTH the “Notes to Vendor” and the line item description fields, indicate that you are “CANCELING ALL ITEMS”.
    - When you print the POA, your notes and the line items with $0.00 amounts indicated will appear on the printed POA. You can then send this to the vendor as applicable.
    - NOTE: The dollar amounts can all be reduced to $0.00, but the QUANTITY cannot all be zero. If you chose “quantity” as your item type, leave the quantity in and just change the unit cost to $0.00.
  - If partial payment has been made:
• For the line items that do not have payments against them, reduce the unit cost to $0.00, same as above. Indicate in the line item description that you are canceling that item.

• For those line items that have payments made against them, reduce the unit cost and/or quantity to the amount already paid. Indicate in the line item description that you have reduced the line to the amount already received/paid for and the remainder is being cancelled.

• In the “Notes to Vendor” field write a summary of all changes made.

Purchase Order Amendment General Processing Steps

Initiating a PO Document

1. Search for the PO you want to change (amend) from the PO search screen.
   • See Appendix A - Searching for Purchase Order Instructions

2. From Search Results choose the document/notification ID associated with the PO that you wish to change. Remember: to initiate a POA, it must be in “Open” status.

3. For OPOs, Central Procurement and Risk Management users (i.e., roles with Purchasing Processor permissions) a PO document in “open” status will display the following buttons:

   sensitive data retransmit payment hold amend void order send ad hoc request close

   Note: “void order” button is only available if no payments have been made. Once payments have been made, there will be a “close order” button instead. Selecting the “close order” button closes the PO so that no other actions can be taken. This is similar to the “release remaining encumbrances” option in eFMIS.
General users, i.e., those with non-Purchasing Processor permissions, may have the following buttons:

4. To create the PO Amend document and initiate the PO Amend workflow, follow the steps below:

- Click “amend” to create a PO Amend e-doc. The system prompts the user with a dialog box to confirm desire to initiate a POA and asking for reason for the PO change. The response is then automatically inserted in the Notes and Attachments tab of the POA (as well as all prior versions of the PO).

- **DOCUMENT OVERVIEW**:
  - *DESCRIPTION*: Enter brief description per your department’s internal instructions. (Required field)
  - EXPLANATION: Enter additional text, if desired, to describe reason for PO Amend action.
  - ORGANIZATION DOCUMENT NUMBER: If applicable, enter legacy document number here.
  - CHART/ORG: DO NOT CHANGE CHART/ORG. If PO Amend must be routed to an additional approver, use Ad Hoc Recipient feature to route to the additional individual.
  - DO NOT CHANGE ALL OTHER REMAINING FIELDS IN DOCUMENT OVERVIEW TAB.

- **DELIVERY**:
  - GENERAL: Delivery fields may be edited, if needed.
  - NOTE: If delivery information will be changed, enter message describing the revisions in the DELIVERY INSTRUCTIONS field in order to alert Vendor of revisions to original delivery instructions. This field will print on the output PO Amend document.

- **VENDOR**:
  - VENDOR NAME AND #: CANNOT BE CHANGED.
Vendor Address: May be edited, if needed. Revised address will print on PO Amend output document.

VENDOR CHOICE: Menu selection may be changed, if needed.

CUSTOMER #: May be edited, if needed.

NOTES TO VENDOR: Enter the applicable Amendment No. and brief description of the changes to alert the reader of the changed conditions.

- **IMPORTANT**: Baseline PURAP does not assign a sequential count number for each new PO Amend document processed, e.g., Amendment #1, Amendment #2, etc. Therefore, it is recommended that OPOs manually assign sequential Amendment numbers to each POA processed and that the applicable Amendment number be entered in the NOTES TO VENDOR field of the POA document. See example below.

- **STIPULATIONS**: If needed, enter any general information text here. This field will display on the printed POA document.

- **ITEMS**: Enter changes to Item Quantity, UOM, Description or Unit Cost and to the related Accounting Line fields, Chart, Account Number, Object Code and Percent, as needed.

- **SPECIAL NOTES REGARDING ITEM LINE CHANGES**:
  - Prior to Payment Request processing, item line fields may be edited pursuant to the System Processing Rules noted above.
  - The “Delete” button removes (i.e. erases) any new item lines added.
  - UH will not use the “Inactivate” button. Once inactivated, the line cannot be reactivated.
  - If an item line must be cancelled and no Payment Requests have yet been processed against it, you may enter “0.00” in the unit cost. This will reverse the encumbrance accordingly and the line will be noted on the printed PO Amend document as a zero dollar item line.
If you need to cancel all item lines, refer to the instructions for cancellation of an order under the “UH Procedural Recommendations” section above.

IMPORTANT: Once Payment Requests have been processed, Item and Accounting lines may be closed. Therefore, be sure to carefully review the POA System Processing Rules provided above before proceeding with Item Line changes.

- **CAPITAL ASSET**: If capital asset information was previously entered on the PO, it may be modified here, as needed.

- **ADDITIONAL INSTITUTIONAL INFO, SPECIAL NOTE**: If the original PO or any previously processed PO Amendment document was approved by OPRPM because the PO exceeded the $25,000 OPO purchasing limit, and a new PO Amendment is being processed which would bring the PO total to less than this threshold amount, the system will NOT automatically route the new POA to OPRPM for approval, as required by University policy. Accordingly, in such cases, OPOs should be sure to select the Cost Source code, “Central Procurement Approval Required,” located in the Additional Institutional Information tab to enable the POA to properly route to OPRPM for approval.

- **AD HOC RECIPIENT**: Use this feature to notify an individual about the PO Amend document or to obtain an approval.

  - After confirming the accuracy of the changes, click the submit button.
  - KFS will then automatically route the POA to appropriate approvers as established by your business office. See diagram on page 2.
  - To view the next person(s) in the route path who must approve the PO Amend, open the appropriate sections within the Route log tab.
Search for a Purchase Order

Process

In this tutorial, you will learn how to search for Purchase Orders using a Custom Document Search for the purposes of the Purchase Order Amend process.

KFS provides a robust search engine to find purchase orders.

Navigation: Main Menu>Custom Document Searches>Purchasing/Accounts Payable>Purchase Orders

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<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the “Purchase Orders” link.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
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</tr>
</tbody>
</table>
| 2.    | Search fields are self-explanatory; however, some of the most common are reviewed in this tutorial.
You can specify as many or as few fields as you wish to narrow your search. Remember a search with few criteria may take significantly longer than a search which contains many criteria. |
| 3.    | The **Type** field is automatically populated with the **PO** Type. **Note**: If at any time you need to search for a **Purchase Order Amend** or a **Requisition** document you can change this field to **POA** or **REQS**. As a result, the search fields will reset depending on the document type you select. |
| 4.    | The **Initiator** field can be used if you are looking for PO’s that you initiated. |
5. **The Document/Notification Id field** can be used if you know the Id number of the e-doc.

   **Note:** Do not use this field to enter the PO number.

6. **The Date Created From and Date Created To fields** can be used if you wish to find Purchase Orders within a date range.

7. **The Document Description field** can be used if you identify your Requisitions with a specific description (i.e., FO Code, or library.) Use the wildcard to search for a range of descriptions.

8. **The Purchase Order # field** can be used if you know the PO number.

9. **The Requisition # field** can be used if you are searching for a Purchase Order but only know the Requisition number for the Purchase Order.
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<tr>
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<tbody>
<tr>
<td>10.</td>
<td>The <strong>Purchase Order Status</strong> field is useful if you are tracking the status of your <strong>Purchase Orders</strong>. Since <strong>Purchase Orders</strong> must be in <strong>Open</strong> status in order to use the <strong>PO Amend</strong> process, the <strong>Purchase Order Status</strong> field can be used to find only the PO's in <strong>Open</strong> status.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the “<strong>Open</strong>” option in the <strong>Purchase Order Status</strong> field listing.</td>
</tr>
<tr>
<td>12.</td>
<td>It is always suggested to narrow your search by selecting your <strong>Chart Code</strong>. Click the “<strong>Chart Code</strong>” drop down list box.</td>
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<td>Step #</td>
<td>Procedure</td>
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</tbody>
</table>
| 13.   | Select the applicable **Chart Code** for your campus.  
       | Select the “MA” option for this example. |
| 14.   | In the **Search Result Type** field:  
       | **Document Specific Data** - select this option if you want to include various PO document info columns in the search results.  
       | **Workflow Data** - select this option if you want to include the status of the PO in the search results. | | Search Result Type:  |  Document Specific Data  |  Workflow Data  |
| 15.   | If the search parameters you selected are ones you use regularly you may want to name your search in the **Name this Search** field.  
       | Once you create/name a search the search will be saved under that name and can be used over and over by selecting the name from the **Searches** drop down listbox in the upper right hand corner of this lookup page. | Name this search (optional): |  |
| 16.   | Click the **search** button. | search |
Step # | Procedure
--- | ---
17. | **Important**: to initiate a Purchase Order Amend, the Purchase Order must be in **Open** status.
18. | From the **Search Results** choose the **Document/Notification Id** associated with the **PO** that you wish to change.

Click the “6788” Id for this example.
<table>
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<tr>
<th>Step #</th>
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</thead>
<tbody>
<tr>
<td>19.</td>
<td><strong>Note</strong>: The action of <strong>amend</strong> is used to begin the <strong>Purchase Order Amend</strong> process. The action buttons at the bottom of the document are dependent on the user’s role. See General Processing steps for more details.</td>
</tr>
<tr>
<td>20.</td>
<td>You have successfully completed the <strong>Search for a Purchase Order</strong> tutorial for the purposes of the <strong>Purchase Order Amend</strong> process.</td>
</tr>
</tbody>
</table>
Processing a POA Before Payment Has Been Processed

Process

21. Once you have located your Purchase Order document you may want to keep the tabs open or closed.

Click the “collapse all” button.
22. Click the "amend" button to create a **Purchase Order Amendment** e-doc.
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>The system prompts the user with a dialog box to enter the reason for the PO change and gives the user a chance to confirm they really want to amend the Purchase Order. In this tutorial enter “Total cancellation of order” and click the “yes” button.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>--------</td>
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</tr>
<tr>
<td>24.</td>
<td>A new Doc Nbr is displayed for the PO Amend e-doc and the Purchase Order Status now displays Change in Process.</td>
</tr>
</tbody>
</table>
| 25.    | The Document Overview tab allows users to edit or enter new information into the Description, Explanation, and Org Doc Nbr fields.  
  
  **Note**: Do not change any of the remaining fields in the Document Overview tab. |
<p>| 26.    | Click the &quot;expand all&quot; button. |</p>
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>27.</td>
<td>Click the “hide” button on the Document Overview</td>
</tr>
<tr>
<td>28.</td>
<td>Scroll down to view the complete Vendor tab.</td>
</tr>
</tbody>
</table>
Step # | Procedure
--- | ---
29. | The **Notes To Vendor** field under the **Vendor Info** box allows the user to enter an applicable amendment number to show the different versions of the **POA** and a brief description of the changes to alert the reader of the changed conditions.

Enter “**POA #1 TOTAL CANCELLATION OF ORDER DUE TO CHANGES IN DEPARTMENTAL REQUIREMENTS.**” into the **Note to Vendor** field.
### Step # | Procedure
--- | ---
30. | In the **Current Items** section you may enter changes to the Item QTY, UOM, Description, or Unit Cost. You may also enter changes to the Chart, Account Number, Object Code and *Percent fields in the Accounting Line.

31. | In this example, you will be canceling all item lines. Therefore, you will need to enter a further explanation into the Description field as to what is being done.  

   Click the “Pencil” button next to the Description field to open an expanded description window for Item 1.
Step # | Procedure
---|---
32. | Enter “CANCELLING ITEM #1, COST HAS BEEN REDUCED TO -0-” into the **description** field for **Item 1**.
33. | Scroll to the bottom of the **description** window.
<table>
<thead>
<tr>
<th>Step #</th>
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</thead>
<tbody>
<tr>
<td>34.</td>
<td><strong>Click the “continue” button to save and close the description window.</strong></td>
</tr>
</tbody>
</table>

**Note:** The *continue* button saves and closes the expanded *description* window. If you do not click the *continue* button, your input will not be saved.
Step # | Procedure
---|---
35. | Since the item line must be cancelled and NO Payment Requests have yet been processed against it, you may enter “0.00” in the **Unit Cost** field.

**Note:** This will reverse the encumbrance accordingly and the line will be noted on the printed **PO Amend** e-doc as a zero dollar line item.

36. | Enter “0.00” into the **Unit Cost** field for **Item 1**.

37. | Since you are cancelling all item lines, you will need to enter a further explanation into the **Description** field of **Item 2**.

38. | Click the “**Pencil**” button next to the **Description** field to open an expanded description window for **Item 2**.
<table>
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<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.</td>
<td>Enter “CANCELLING ITEM #2, COST HAS BEEN REDUCED TO -0-“ into the description field for Item 2.</td>
</tr>
<tr>
<td>40.</td>
<td>Scroll to the bottom of the description window.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>-------</td>
<td>-----------</td>
</tr>
<tr>
<td>41.</td>
<td>Click the “continue” button to save and close the description window for <strong>Item 2</strong>.</td>
</tr>
</tbody>
</table>
| 42.   | Since the item line must be cancelled and **NO** Payment Requests have yet been processed against it, you may enter “**0.00**” in the **Unit Cost** field.  
**Note:** This will reverse the encumbrance accordingly and the line will be noted on the printed **PO Amend** e-doc as a zero dollar line item. |
| 43.   | Enter “**0.00**” into the **Unit Cost** field for **Item 2**. |
| 44.   | Scroll down to view **Item 3**. |
### Step #  Procedure

45. Since you are cancelling all item lines, you will need to enter a further explanation into the **Description** field of **Item 3**.

46. Click the **“Pencil”** button next to the **Description** field to open an expanded description window for **Item 3**.
### Step # | Procedure
--- | ---
47. | Enter “CANCELLING ITEM #3, COST HAS BEEN REDUCED TO -0-” into the **description** field
48. | Scroll to the bottom of the **description** window.
49. | Click the **continue** button to save and close the **description** window for **Item 3**.
50. | Since the item line must be cancelled and **NO** Payment Requests have yet been processed against it, you may enter “0.00” in the **Unit Cost** field.

**Note:** This will reverse the encumbrance accordingly and the line will be noted on the printed **PO Amend** e-doc as a zero dollar line item.
51. | Enter “0.00” into the **Unit Cost** field for **Item 3**.
## Step # | Procedure
---|---
52. | After confirming the accuracy of the changes you are ready to submit this e-doc.
53. | Scroll to the bottom of the window.
54. Click the "submit" button.

55. KFS will automatically route the POA to the appropriate approvers as established by your business office.

**Note:** To see the next person(s) in the routing path that must approve the PO Amend, you may open the appropriate sections within the Route Log tab.

56. You have successfully completed the tutorial on creating a Purchase Order Amendment.
Printing a POA

Process

In this tutorial after the POA has been fully approved, the Purchase Order Amendment output document may then be printed. It should be noted that unlike the initial Print action taken on newly created POs, baseline PURAP does not require the user to print a POA document. Instead, PURAP provides a ‘retransmit’ feature which enables the user to print a PO Amend document on an optional basis.

Note: Notwithstanding this system functionality, UH recommends that all PO Amendment documents be printed as a matter of record for departmental files and for issuance to the vendor when needed. Accordingly, follow the steps below to print the Purchase Order Amendment document.

Exercise 1

In this exercise you will use the PO Document Number from the label in the front of the manual to search for the POA that needs to be printed. Below you will find steps to help you locate your POA e-doc.

- To print the POA, go to Main Menu>Custom Doc Search>Purchasing/Accounts Payable> Purchase Order feature.
- At the Document Lookup page, be sure to enter the fixed PO document number (not the dynamic e-doc number) to view all prior versions of the PO.
- Select the PO e-doc in “Open” status.
- Then click the button at the bottom of the page.
- The system will advance to a Purchase Order Retransmit e-doc and display a Purchase Order Retransmit tab.
- Within the Purchase Order Retransmit tab, go to the PO Header field and select menu option “Retransmission of PO.” This will prompt the system to print “Purchase Order Amendment” at the top of the output document.
- In the Items section, click “select all” to check all item lines to be printed on the PO Amend document (UH requirement).
- Click the button to generate the output PO Amend document.
o  **NOTE:** If ![preview PDF](image) is clicked, the system will render a preliminary version of the POA and produce a “draft” watermark across the document.

- Be sure to save the image to your computer before printing.
- Then print the PO Amendment output document.
- Send Purchase Order Amendment to Vendor, if needed.
In this tutorial, you will learn how to process a partial cancellation and adjust the tax dollar amount on a **Purchase Order Amendment** after a payment request has been processed.

### Step # 57.

Once you have located your original **Purchase Order** using the **Doc Search** function you may want to **expand all** or **collapse all** the tabs.

Click the “**collapse all**” button.
58. Click the “Amend” button.

59. Enter “PARTIAL CANCELLATION OF ORDER AND ADJUST TAX AMOUNT.” into the Reason field.

60. Click the “yes” button.
Step # | Procedure
---|---
61. | A new Doc Nbr is displayed on the PO Amend e-doc.
62. | Click the “show” button on the Document Overview tab.
### Step #63

The **Document Overview** tab allows users to edit or enter new information into the **Description**, **Explanation**, and **Org Doc Nbr** fields.  

**Note:** Do not change any of the remaining fields in the **Document Overview** tab.

Click the **"hide"** button on the **Document Overview** tab.
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<tr>
<td>64.</td>
<td>Click the “show” button on Vendor tab.</td>
</tr>
<tr>
<td>65.</td>
<td>Enter “POA #1: PARTIAL CANCELLATION OF ORDER DUE TO CHANGES IN DEPARTMENTAL REQUIREMENTS and CANCEL ITEM 2. DECREASE ITEM 3 UNIT PRICE TO $70.68 FOR ADJ. IN TAX AMOUNT” into the Notes to Vendor field.</td>
</tr>
<tr>
<td>66.</td>
<td>Click the “hide” button on the Vendor tab.</td>
</tr>
</tbody>
</table>
Step # | Procedure
---|---
67. | Click the “show” button on the Items tab.
68. | In this example, you will be entering a zero dollar item line for Item #2. Therefore, you will need to enter a further explanation into the Description field as to what is being done.

Click the “Pencil” button next to the Description field.
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<thead>
<tr>
<th>Step #</th>
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<tr>
<td>69.</td>
<td>Enter “UPDATE: CANCEL ITEM 2 COST HAS BEEN REDUCED TO -0-” into the <strong>Description</strong> field.</td>
</tr>
<tr>
<td>70.</td>
<td>Click the <strong>continue</strong> button.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
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<tr>
<td>-------</td>
<td>-----------</td>
</tr>
<tr>
<td>71.</td>
<td>Since the <strong>item line</strong> will be cancelled enter <strong>“0.00”</strong> in the <strong>Unit Cost</strong> field. <strong>Note:</strong> This will reverse the encumbrance accordingly and the line will be noted on the printed <strong>PO Amend</strong> e-doc as a zero dollar line item.</td>
</tr>
</tbody>
</table>
### Step # | Procedure
--- | ---
72. | In this example, you will be adjusting the **Tax** for the purchase. Therefore, you will need to enter a further explanation into the **Description** field as to what is being done. Click the “**Pencil**” button next to the Description field.
73. | Enter **“UPDATE: DECREASE ITEM 3 UNIT PRICE, TAX AMOUNT”** into the **Description** field.
74. | Click the “**continue**” button.
75. Since the total Unit Cost has been reduced for the item line the tax must recalculated.
   Click in the “Unit Cost” field.  

76. Please enter “70.68” into the Unit Cost field.

77. Click the “close” on the Items tab.

78. Click the “submit” button.

79. KFS will automatically route the POA e-doc to the appropriate approvers as established by your business office.

   Note: To see the next person(s) in the routing path that must approve the PO Amend, you may open the appropriate sections within the Route Log tab.

   You have successfully completed the tutorial on creating a Purchase Order Amendment after a payment has been processed.
Purchase Order Void

Process

If you need to cancel a PO after it has been fully approved but not yet sent to the vendor and no payments have yet been processed, the Void Order (POV) document allows you to cancel the PO and disencumber all related items.

System Processing Rules

- The POV document may be initiated only by Organizational Purchasing Officers, Central Procurement Approvers and Risk Management Approver, i.e., users granted KFS Purchasing Processor permissions.
- The PO must be in “Open” status and no payments have been issued against it.
- Note: When you click void order button to initiate the document, the system automatically inserts note text in the Notes and Attachments tab of both the original PO and the POV document.
- The POV becomes final after it has been submitted.
- UH is recommending that the “void order” option only be used if the order has not yet been placed with the vendor (e.g., an error was found on a PO that was fully approved, but the hardcopy has not yet been mailed out to the vendor).

Navigation: Main Menu>Custom Document Searches>Purchasing/Accounts Payable>Purchase Orders
Step #   Procedure

80.   Click the “Purchase Orders” link.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>81.</td>
<td><strong>Note</strong>: The POV document may be initiated only by Organizational Purchasing Officers, Central Procurement Approvers and Risk Management Approver, i.e., users granted KFS Purchasing Processor permissions.</td>
</tr>
<tr>
<td>82.</td>
<td>If known, narrow your search by entering the doc number in the <strong>Document/Notification Id</strong> field. For this example, enter “6957” in the <strong>Document/Notification Id</strong> field.</td>
</tr>
<tr>
<td>83.</td>
<td>Click the “<strong>search</strong>” button.</td>
</tr>
<tr>
<td>84.</td>
<td>Review the document to be sure you selected the correct <strong>Purchase Order</strong> to void.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>-------</td>
<td>-----------</td>
</tr>
</tbody>
</table>
| 85.   | The **void order** button is available at the bottom of the document for OPO's, Central Procurement and Risk Management users (roles with purchasing processor permissions.)  

**Note:** General users (those with non-purchasing processor permissions) will not have access to the void order button. |
| 86.   | UH is recommending that the **“void order”** option only be used if the order has not yet been placed with the vendor (e.g., an error was found on a **PO** that was fully approved, but the hardcopy has not yet been mailed out to the vendor.)  

Click the **“void order”** button. |
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>87.</td>
<td><strong>Note</strong>: When you click the <strong>void order</strong> button to initiate the document, the system requires a reason for the void.</td>
</tr>
<tr>
<td>88.</td>
<td>Click in the “<strong>reason</strong>” box.</td>
</tr>
</tbody>
</table>
| 89.    | Enter **“Voiding the PO per department.”** in the reason box.  
**Note**: Once the reason is submitted, the system automatically inserts the reason noted above in the **Notes and Attachments** tab of both the original **PO** and the **POV** document. |
| 90.    | Click the **“yes”** button to confirm that you want to void the **PO**. |
| 91.    | **Note**: The system will display a window that displays the following message:  
**“Your Purchase Order Void request was successfully submitted.”**  
Simply click the **“ok”** button to complete the submission process. |
| 92.    | The **Purchase Order Void** document becomes final after it has been submitted. |
| 93. | You have successfully completed the **Purchase Order Void** tutorial for the purposes of the **Purchase Order Amend** process. |