

Cancelling a Purchase Order In McGill MarketPlace

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Cancelling a Purchaser Order MMP

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Introduction

What is a Purchase Order Cancellation?

The process of canceling an existing purchase order in McGill MarketPlace and in Banner. This process liquidates the entire purchase order encumbrance.

When is a Purchase Order Cancellation necessary?

Whenever goods or services are no longer required, or the purchase order has been duplicated.

****However, if a purchase order already has existing invoices paid against it, the purchase order must be liquidated rather than canceled. To learn how to liquidate a purchase order, visit the Financial Services [website](#).**

Can Purchase Order Cancellations be processed for all order types?

Purchase Order Cancellations can be processed for all order types; however, before doing so, ensure you follow the guidelines provided below in the “What do I need to know before processing a Purchase Order Cancellation” section.

What do I need to know before processing a Purchase Order Cancellation?

Ensure the goods or services have not been received by the client
Ensure the supplier provides a written order cancellation acknowledgment via email
Ensure to attach the supplier written order cancellation acknowledgement to MMP

What if I accidentally cancel the Purchase Order?

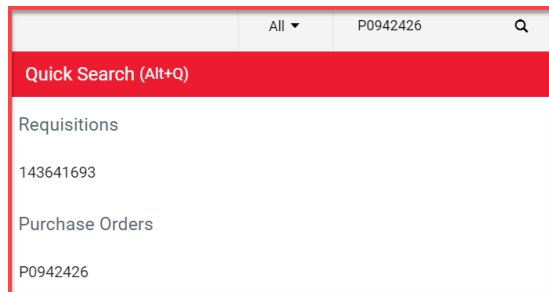
Contact Procurement Services by placing a [JIRA](#) ticket.

What if I canceled the Purchase Order but I still see the amount encumbered in my FOAPAL?

Contact Procurement Services by placing a [JIRA](#) ticket.

Cancelling a Purchase Order in MMP

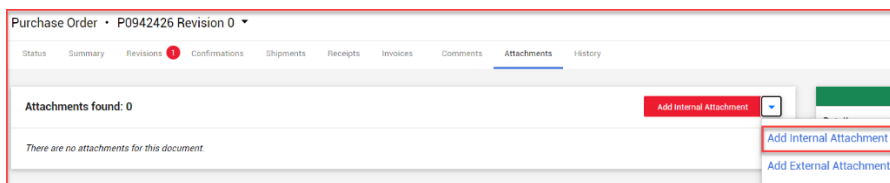
Step 1. Enter the PO number in the search engine



Search results for P0942426:

- Quick Search (Alt+Q)
- Requisitions
- 143641693
- Purchase Orders
- P0942426

Step 2. Go to the **Attachments** tab and add the supplier's written order cancellation acknowledgement by clicking on the drop-down arrow and selecting **Add Internal Attachment**.



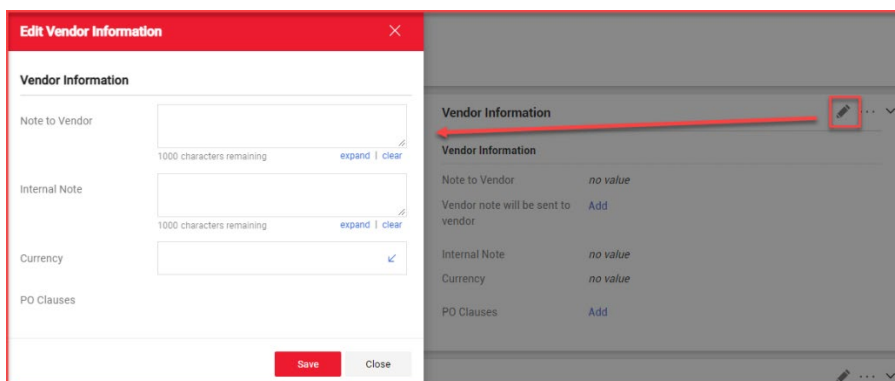
Purchase Order - P0942426 Revision 0

Attachments found: 0

There are no attachments for this document.

Buttons: Add Internal Attachment, Add Internal Attachment, Add External Attachment

Step 3. In the **Summary** tab, go to **Vendor Notes** and add a reason for the cancellation, then **SAVE**.



Edit Vendor Information

Vendor Information


Note to Vendor: 1000 characters remaining

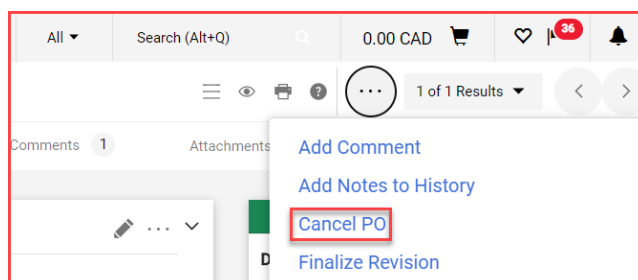
Internal Note: 1000 characters remaining

Currency: [dropdown]

PO Clauses: [dropdown]

Buttons: Save, Close

Step 4. Scroll back up to the Purchase Order, click on the menu icon  and select **Cancel PO**



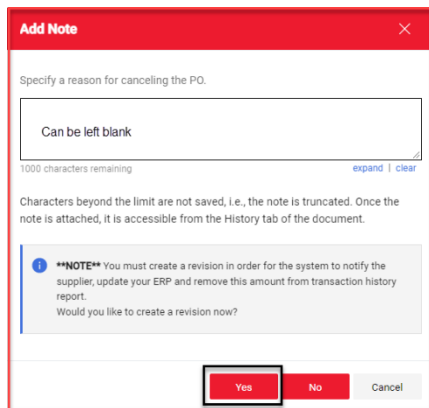
Search (Alt+Q) 0.00 CAD 36

1 of 1 Results

Comments 1 Attachments

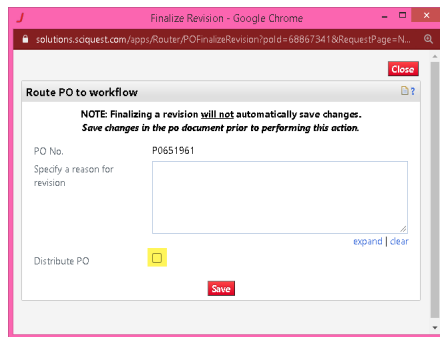
Buttons: Add Comment, Add Notes to History, Cancel PO, Finalize Revision

Step 5. A confirmation box will open. Click on **Yes**. No need to add additional information in the reason box.



The 'Add Note' dialog box has a red header bar with the title 'Add Note' and a close button. The main area contains a text input field with the text 'Can be left blank'. Below the field, it says '1000 characters remaining' and has 'expand' and 'clear' links. A note section with a blue icon and text states: '**NOTE** You must create a revision in order for the system to notify the supplier, update your ERP and remove this amount from transaction history report. Would you like to create a revision now?'. At the bottom, there are three buttons: 'Yes' (highlighted with a red box), 'No', and 'Cancel'.

Step 6. A cancellation notice must be sent to the supplier. Ensure the **Distribute PO** box is checked off.



The 'Finalize Revision' dialog box has a pink header bar with the title 'Finalize Revision - Google Chrome'. The main area contains a text input field with the text 'Can be left blank'. Below the field, it says '1000 characters remaining' and has 'expand' and 'clear' links. A note section with a blue icon and text states: '**NOTE** Finalizing a revision will not automatically save changes. Save changes in the po document prior to performing this action.' Below the note, there is a 'PO No.' field with the value 'P0651961'. Below that, there is a 'Specify a reason for revision' text input field. Below the field, there is a 'Distribute PO' checkbox which is checked. At the bottom, there is a 'Save' button.

Step 7. The purchase order will move through all approval processes before it is finalized, encumbrance released, and PO closed.

END OF PROCESS

Purchase Order Cancellation Status

To view the status of the Purchase Order Cancellation, go to the Purchase Order in MMP, then go to the right-hand side of the page and click on **What's Next**.

The Purchase Order will remain pending while it is transmitted to the Financial Information System where it will liquidate the purchase order and close the encumbrance.

To ensure the Purchase Order is successfully transmitted, go to the History tab, and read the note that will indicate **The PO was successfully distributed to the ERP system**.

What's next?

Workflow Status: **Pending**

Workflow:

- Show skipped steps
- Submitted** (16/12/2021 2:52 PM, Darcie-Jean Altuve)
- Revise PO** (Completed)
- PO Export** (Completed)
- PO Change Response** (Active)
- PO Distribution** (Future)
- Finish** (Future)

Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
1		26/07/2022 3:10:08 PM	System		PO Export sent to external system	Successfully sent to the Financial Information System PO Change Response Step			The PO was successfully distributed to the ERP system.
1		26/07/2022 3:09:23 PM	System	PO Export	PO Export sent to external system				PO was queued up for submission

The cancellation process is complete once the final workflow step **Finish** has changed to **Completed**. For finance users, go to Banner, then to FGIENCD to ensure the Purchase Order encumbrance has been liquidated and closed.

Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
1		26/07/2022 3:16:40 PM	System		PO Approvals completed	Finish Step			
1		26/07/2022 3:16:40 PM	System		PO Sent via HTML attached email				orders@glenres.com
1		26/07/2022 3:16:31 PM	System		Received PO posted status from an external system				
2		26/07/2022 3:16:31 PM	System		PO modified	External PO Ref #: empty			P1053502
1		26/07/2022 3:10:08 PM	System		PO Export sent to external system				The PO was successfully distributed to the ERP system.
1		26/07/2022 3:09:23 PM	System	PO Export	PO Export sent to external system				PO was queued up for submission

Workflow Status: **Completed**

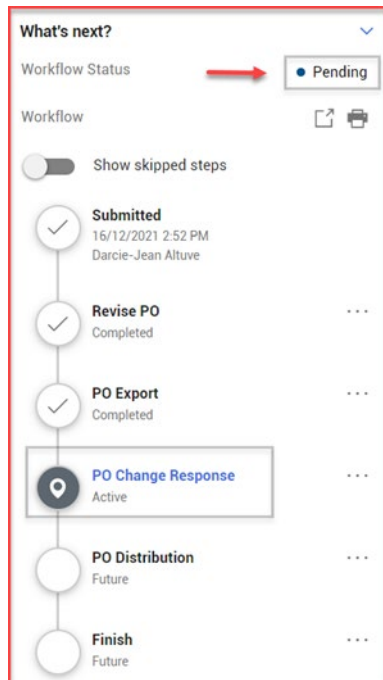
Workflow:

- Show skipped steps
- Submitted** (26/07/2022 2:12 PM, Sinan Faiaid)
- Revise PO** (Completed)
- PO Export** (Completed)
- PO Change Response** (Approved)
- PO Distribution** (Completed)
- Completed** (26/07/2022 3:16 PM)

Purchase Order Cancellation Errors

Sometimes during the cancellation process, MMP may encounter issues while attempting to transmit the request to the Financial Information System. If this occurs and the history note does not indicate **The PO was successfully distributed to the ERP system**, and is replaced by a error notification, please reach out to Procurement Services Frontline Team by placing a [JIRA](#) ticket.

Procurement Services regularly monitors MMP to identify and resolve system related issues. However, submitting a support request will help expedite the process.



Line No	Revision No.	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
1		27/07/2022 2:40:06 PM	System	PO Export	PO Export sent to external system	System Error PO Change Response Step			Received a temporary failure code: 500, status text: Internal Server Error. Message Post Failed... Show more
1		27/07/2022 2:39:30 PM	System	PO Export	PO Export sent to external system				PO was queued up for submission
1		27/07/2022 2:39:25 PM	System	PO Revision	Finalized				

Notifications

Email Notifications are not sent to the users; therefore, it is incumbent of them to ensure the Purchase Order has been successfully canceled.

Contact Us

For support, please reach out to Procurement Services Frontline Team by placing a [JIRA](#) ticket.