Reopen Closed PO Overview

The Purchase Order Reopen Application Engine process (PO_POREOPEN) gives you the ability to reopen purchase orders. To perform the Purchase Order Reopen process you need to have the authorization to do so. To enable users to be able to reopen purchase orders, you must establish their authorization using the Set Up Financials/Supply Chain – Common Definitions – User Preferences – Define User preferences - Procurement - Purchase Order Authorizations page.

Also, the user will need to be granted the PO Power security role for the page and process access.

A purchase order that has been canceled at the header level is not eligible for reopening. Purchase orders that were closed prior to the PeopleSoft 9.1 Upgrade are not available to be reopened using this functionality. Essentially, any PO closed prior to October 22nd, 2013 cannot be reopened.

Using the Purchase Order Reopen process you can reopen purchase orders by:

- Undoing changes made by the Last Close PO Run. The process reverses the effects of the Close Purchase Orders process on the most recently processed group of purchase orders. This functionality is not used at UW.
- Reopening selected purchase orders. This process enables you to reopen a range of purchase orders, a specific purchase order, or all purchase orders associated with a business unit.

Note: At UW this functionality should not be used to re-open POs from a closed Fiscal Year.
University of Wisconsin System
SFS Business Process
PO.2.04 – Reopen Closed PO

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>As needed</th>
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<tbody>
<tr>
<td>Dependencies</td>
<td></td>
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<tr>
<td>Assumptions</td>
<td>User has required User Preference and Security access</td>
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<tr>
<td>Responsible Parties</td>
<td>Institution PO Power users will be able to Reopen Closed POs and UWSA system support will assist with PO Reopen functionality.</td>
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<td>Alternate Scenarios</td>
<td>None</td>
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Process Detail

I. Running the Purchase Order Reopen Process

Navigation: Purchasing > Purchase Orders > Reconcile POs > Reopen POs

1. Click [Find an Existing Value] to select an Existing Run Control ID or Click on [Add a New Value] to Enter a Run Control ID: ‘Reopen_Closed_POs’
2. **Select** POs to be Reopened radio button. Use this option if you want to reopen any purchase order that has already been closed.
3. **Select** Reopen Request: Values are:
   a. **Select** ‘Range of Documents’ if you want to reopen a range of purchase orders.
      i. **Enter** the Purchase Order(s) you would like to reopen
b. Select ‘Specific Business Unit’ if you want to reopen the purchase orders associated with a specific business unit.
   i. **Select the Business Unit**

c. Select ‘Specific Document’ if you want to reopen a specific purchase order
   i. **Select the Purchase Order**
4. **Select PO Date.** Values are:
   a. ‘All’ - **Select** if you want to reopen purchase orders for all purchase order dates.
   b. ‘Range’ - **Select** if you want to reopen purchase orders for a certain date range
      i. Enter the date range using the From and To date fields.
   c. ‘Value’ - **Select** if you want to reopen purchase orders for a specific date.
      i. Enter the Date

5. **Select Activity Date.** Values are:
   a. ‘All’ - **Select** if you want to reopen purchase orders for all activity dates.
   b. ‘Value’ - **Select** if you want to reopen purchase orders for a specific date.
      i. Enter the Date

6. **Select Vendor ID.** Purchase orders associated with that vendor will be reopened.

7. **Select Buyer.** Purchase orders associated with that buyer will be reopened.

8. **Enter PO Reference.** Purchase orders associated with that purchase order reference will be reopened.

9. **Select an Accounting Date Options**
   a. **Select Open with Specified Accounting Date** if you want to reopen the purchase orders using the accounting date you specify. The current date appears by default in the date field but you can override it if you choose.
   b. **Select Open with Existing Accounting Date** if you want to reopen the purchase orders using the existing accounting date on the purchase orders.

10. **Check Reopen Associated Requisitions** if you want the Purchase Order Reopen process to reopen the requisition lines that are associated with purchase orders you are requesting to be reopened. Even though UW does not use requisition functionality, since commitment control is being utilized, this check box must be selected.

11. **Click Run**
## Revision History

<table>
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<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
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<tr>
<td>Jim Backus</td>
<td>1.0</td>
<td>05/30/2013</td>
<td>Initial Draft</td>
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<tr>
<td>Susan Kincanon</td>
<td>1.1</td>
<td>06/12/2013</td>
<td>Review and format</td>
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<tr>
<td>Mark Flemington</td>
<td>1.2</td>
<td>07/02/2013</td>
<td>Final review</td>
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<td>1.3</td>
<td>07/02/2013</td>
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