

9.2 Re-Opening a Purchase Order

Purpose: Use this as a reference how to reopen a Purchase Order within ctcLink.

Audience: Purchasing staff

 You must have at least one of these local college managed security roles:

- ZZ Purchase Order Processing

You must also set these User Preference Definitions:

- [User Preferences: Purchase Order Entry](#)
- [Buyer Setup](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

 ctcLink Purchasing provides the **Purchase Order Reopen** process to undo changes made by the PO Reconcile and Close process.

Running this process returns each PO status to its status prior to the last run of the PO Reconcile and Close process. POs that have been cancelled cannot be reopened.

Re-Opening a Purchase Order

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

1. The **Reopen Closed Purchase Orders** search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
 - NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA010_REOPEN_PO (College, Process).

3. The **Reopen POs** page displays. Enter or update the parameters.
4. Choose one of the following options:
 - **Last Close PO Run:** reverses the effects of the Close PO process on the most recently processed group of purchase orders.
 - **Select POs to be Reopened:** to select a specific document.

 **Note:** Skip to Step 10 if the Last Close PO Run option is selected.

5. If the **Select POs to be Reopened** option is selected, the section called 'Reopen PO Selection' Criteria expands.
6. Select **Specific Document** from drop down for **Reopen Request**.
7. Enter **Business Unit**.
8. Enter or search for the **PO ID**. This can be left blank if selecting the PO by using the PO Date, Activity Date, Supplier ID, Buyer or PO Reference parameters.
9. Select the **Accounting Date Option** based on your requirement.
10. Select the **Save** button.
11. Select the **Run** button.
12. If you get a message saying "Reopen Associated Requisitions? must be checked when Commitment Control is enabled," select **OK** to acknowledge message. Then check the box near the bottom for "Reopen Associated Requisitions?", then select **Run**.

14. The **Process Scheduler Request** page displays. The **Select** checkbox for **Purchase Order Reopen/PO_POREOPEN** should be checked.
15. Select **OK**.

Process Scheduler Request

User ID: CTC_BRAMIREZ Run Control ID: REOPEN_PO

Server Name: Run Date: 08/22/2018

Recurrence: Run Time: 10:12:08AM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Purchase Order Reopen	PO_POREOPEN	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

16. The updated **Reopen POs** page displays.

 Notice that the **Process Instance** number appears. This number helps you identify the process you have run when you check the status.

17. Select the **Process Monitor** link.

Reopen POs

Run Control ID: REOPEN_PO

[Report Manager](#) [Process Monitor](#) [Run](#)

 Process Instance:387782

Process Request Parameters

Last Close PO Run
 Select POs to be Reopened

Reopen PO Selection Criteria

Reopen Request:

Business Unit:

Purchase Order:

PO Date:

Activity Date:

Supplier ID:

18. The **Process Monitor Process List** page displays. Use it to view the status of submitted process requests.
19. The initial status of the process is **Processing**. Select the **Refresh** button until the Run Status is **Success** and the Distribution Status is **Posted**.

View Process Request For

User ID: Type: Last: 1 Days: **Refresh**

Server: Name: Instance From: Instance To:

Run Status: Distribution Status: Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	387782		Application Engine	PO_POREOPEN	CTC_BRAMIREZ	08/22/2018 10:12:08AM PDT	Success	Posted	Details
<input type="checkbox"/>	387779		PSJob	PO_POREP	CTC_BRAMIREZ	08/22/2018 9:25:19AM PDT	Success	Posted	Details

20. To view the reopened PO, navigate to Purchasing>Purchase Orders>Add/Update POs and search for the PO.
21. The Purchase Order status displays the last status of the PO when it was closed. Budget status shows as Not Chk'd.



Note: If a PO Line amount needs to be updated but has already been finalized at the voucher level, editing the AP voucher and unfinalizing the PO Line will set the voucher budget status to Unchecked. This is not recommended, especially if the voucher's budget date is from a budget period that has been closed. Instead, add a new line to the PO, creating a change order, if needed.

22. The purchase order is ready to be Approved (if needed) and Budget Checked.
23. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.



VIDEOS COMING SOON!

Video Tutorial Via Panopto

View the external link to [Re-Opening a Purchase Order](#). This link will open in a new tab/window.