# Closing Purchase Orders

Use this guide to review invoices, check access, and close purchase orders for Academic or Miller School of Medicine.

[http://workday.miami.edu](http://workday.miami.edu)

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## Before Closing a Purchase Order

1. **Invoices** - Be advised, once a purchase order is closed, additional invoices will need to be paid from a different purchase order.
   
   a. Check the requisition’s **Balances** tab to confirm the Commitment Amount Remaining is $0.
   
   **TIP:** If a line item was cancelled by either the department or the supplier, an amount may appear, but the PO can still be closed.

   ![Balances Table](image)

   b. Contact the supplier to confirm all invoices for this purchase order have been paid.

2. **Access** – Only users with the Workday security role *Department Procurement Data Entry Specialist* can close a purchase order. To view the list of users with access:

   a. Scroll down to the Goods/Services Lines and click the Cost Center number.

   ![Service Lines](image)

   b. Click the Roles tab.

   ![Roles Tab](image)
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C. Scroll down to the Department Procurement Data Entry Specialist role. The employees listed have access to close this purchase order.

<table>
<thead>
<tr>
<th>Assignable Role</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Procurement Data Entry Specialist</td>
<td>Manuel Marine</td>
</tr>
<tr>
<td></td>
<td>Diego Rodriguez</td>
</tr>
</tbody>
</table>

**TIP:** To request the Department Procurement Data Entry Specialist security role, email Help@miami.edu.

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**Closing a PO**

<table>
<thead>
<tr>
<th>a. Search for the purchase order.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Click the related actions button, hover over Purchase Order and select Close.</td>
</tr>
<tr>
<td>4. Review the details and confirm this is the correct purchase order. Then click OK.</td>
</tr>
</tbody>
</table>

For assistance, contact the PurchasingHelpDesk@miami.edu.