INFORMS Users,

As part of our ongoing efforts to improve the end-of-year activities, we will begin closing "qualified" Quarter 2 (January 2023 – March 2023) Requisitions and Purchase Orders on **Thursday, May 4, 2023**. This effort will improve system performance, help us reduce the number of errors, and allow the INFORMS team to address any system issues in advance of end-of-year activities.

Below is a brief description of the Requisition and Purchase Order criteria that will be used for closing and additional options if a transaction needs to remain open.

Requisitions:

REQ Status	Budget Status	Hold Status	Source Status	Distribution Line Status
Approved (A)	Valid (V)	Not on hold (N)	Sourcing Complete (C)	Processed (P)

Purchase Order:

PO Status	Budget Status	Hold Status	PO Receipt Status	PO Match Status
Dispatch (D)	Valid (V)	Not on hold (N)	Received (R)	Matched (M)

If a Requisition or Purchase Order meets the criteria for closing but is pending a change order, please take one of the two options below **BEFORE** Thursday, May 4ᵗʰ to prevent it from closing:
- Create a Change Order
- Place the transaction (Req or PO) on HOLD

Note: Placing a **Requisition** on hold will prevent a user from performing the following actions:
- Approving a Requisition
- Sourcing a Requisition to a Purchase Order
- Canceling a Requisition
- Closing a Requisition

Note: Placing a **Purchase Order** on hold will prevent a user from performing the following actions:
- Approving a Purchase Order
- Dispatching a Purchase Order
- Canceling a Purchase Order
- Closing a Purchase Order
- Delete a Purchase Order at the header level

Please find more detailed "how-to" instructions and INFORMS navigation attached.

To assist you in this process, the following reports have been created:

- **Query Name: MNT_PO_RECIEVED_MATCHED** – This report lists all purchase orders in a dispatched status that have been fully received, matched, and qualify for close.
- **Query Name: MNT_PO_INFLIGHT –** This report lists all purchase orders that require an action to put them in a dispatched or canceled status. These will not qualify for closing.

Support for any issues related to this process is available and ongoing. We encourage you to submit a MyIT service ticket to the SCM support team with details of the issue(s) for timely assistance. As always, thank you for your continued support and engagement!

Thank you,
INFORMS Project Team