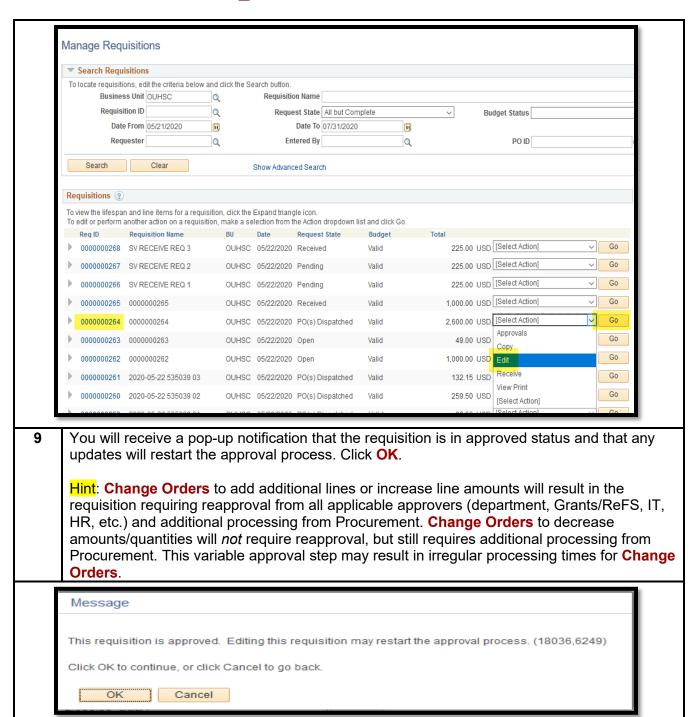The UNIVERSITY of OKLAHOMA

Step	Action
Navigation: eProcurement – Manage Requisitions	
1	A **Change Order** is a request to modify an existing Purchase Order. Most **Change Orders** are requested due to an additional need in quantity or amount for an existing PO. **Change Orders** can also be submitted to request cancellation of a line(s) on a Purchase Order. When processing **Change Orders**, the changes should reflect the needs for the rest of the fiscal year. Hint: **Change Orders** cannot be processed on orders from the OU Marketplace. Contact the Marketplace supplier directly for any changes/issues with an order.
2	**Change Orders** cannot be submitted for changes to the chartfield spread because of how PO funds are encumbered. If the chartfield spread needs to be changed on an existing PO, the department could process a cost transfer to move the funds to the appropriate account after payments are made or, the existing PO could be closed and a new PO, with the updated chartfield spread information, could be entered.
3	**Change Orders** cannot be submitted for supplier name/ID changes. If a supplier changes how they do business, prompting a new supplier record to be created in PeopleSoft, any existing POs to the original supplier must be closed and new requisitions should be entered to the updated supplier name/ID.
4	**Change Orders** cannot be submitted for shipping address changes or to update a line description. To update a shipping address, contact the supplier directly. Description changes cannot be made to a Purchase Order once the PO has been dispatched to the supplier. If clarification is needed on a line, departments should contact the supplier directly.
5	**Change Orders** are usually prompted by the inability to properly receive an existing order or by a notification of a match exception. Match exceptions are prompted when information doesn't match between the Purchase Order and invoice.
6	To process a **Change Order**, click on the **eProcurement** tile on the **Home Screen** and select **Manage Requisitions** on the left side menu.
7	Locate the requisition that needs to be changed. Note that the default search screen in **Manage Requisitions** will only show requisitions from the last week. Enter the **Requisition ID**, if known, or update the **Date From** and **Date To** field to locate the correct requisition. Click **Search**.
8	Once the requisition has been located, click the **Select Action** dropdown menu, select **Edit**, and click the **Go** button.

| 9 | You will receive a pop-up notification that the requisition is in approved status and that any updates will restart the approval process. Click **OK**.

Hint: **Change Orders** to add additional lines or increase line amounts will result in the requisition requiring reapproval from all applicable approvers (department, Grants/ReFS, IT, HR, etc.) and additional processing from Procurement. **Change Orders** to decrease amounts/quantities will *not* require reapproval, but still requires additional processing from Procurement. This variable approval step may result in irregular processing times for **Change Orders**. |

| 10 | Under **Edit Requisition**, click on the **Description** of the line that needs to be updated. |

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

| | | | | My Preferences | Requisition Settings |

Requisition Summary

Business Unit OUHSC
Requester 506696
Currency USD

OU Health Sciences Center

Requisition Name KPMG LLP
Requisition ID 0000024478
Priority Medium
Purchasing Comments

Cart Summary: Total Amount 23,970.00 USD

Expand lines to review shipping and accounting details | Add More Items |

Requisition Lines ?

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments
▶ ☐ 1	Preparation of Form 990T FY22	KPMG LLP	1.00	Batch Lot	10,470.00	10470.00		Edit
▶ ☐ 2	Tax Consulting Services	KPMG LLP	1.00	Batch Lot	10000.00	10000.00		Add
▶ ☐ 3	Preparation of Additional Tax	KPMG LLP	1.00	Batch Lot	3,500.00	3500.00		Edit

☐ Select All / Deselect All   Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Change

Total Amount   23,970.00 USD
Pre-Encumbrance Balance   Not Available

11	You will be returned to the original entry screen where the **Price** and **Quantity** can be updated. Click **Apply** once the changes are made.

Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description   Tax Consulting Services

*Price   10000.0000   *Currency   USD
*Quantity   1.0000   *Unit of Measure   LOT
*Category   821506   Due Date

Supplier

*Supplier ID   9100018752
Supplier Name   KPMG LLP   KPMG LLP

Additional Information

☐ Send to Supplier   ☐ Show at Receipt   ☐ Show at Voucher

Apply

12	The individual **requisition line** and **total amount** will now reflect the updated price.

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	Cart Summary: Total Amount 28,970.00 USD Expand lines to review shipping and accounting details **Requisition Lines** **Line Description** **Supplier** **Quantity UOM** **Price** **Total** **Details Comments Delete** 1 Preparation of Form 990T FY22 KPMG LLP 1.00 Batch Lot 10,470.00 10470.00 Edit 2 Tax Consulting Services KPMG LLP 1.00 Batch Lot 15000.00 15000.00 Add 3 Preparation of Additional Tax KPMG LLP 1.00 Batch Lot 3,500.00 3500.00 Edit Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change Total Amount 28,970.00 USD
13	To add a new line to the requisition, click the **Add More Items** button.
	Edit Requisition - Review and Submit Review the item information and submit the req for approval. My Preferences Requisition Settings **Requisition Summary** Business Unit OUHSC OU Health Sciences Center Requisition Name KPMG LLP Requester 506696 Requisition ID 0000024478 Currency USD Priority Medium Purchasing Comments Cart Summary: Total Amount 23,970.00 USD Expand lines to review shipping and accounting details Add More Items Requisition Lines
14	Click **Requisition** and add in the order details, just like you're creating a new requisition. However, note that your previous lines are still available in your cart.
	Home My Preferences Requisition Settings │ 3 Lines Checkout Search All Search Advanced Search Web Requisition Browse Supplier Websites Create a non-catalog request OU Marketplace
15	Note that when adding a new line, the supplier information will <u>not</u> be copied over. You can only have one supplier per requisition, so please be sure to select the same supplier when adding the additional line.

16	Click **Add to Cart** and then **Checkout** once complete.

17	Once the changes have been made, click on **Check Budget** at the bottom of the screen.

18	You will receive a pop-up notification stating that this action will restart the approval process. Click **OK**.

19	Once the **Budget Checking Status** shows **Valid**, click on **Save & Submit** to process the **Change Order**.

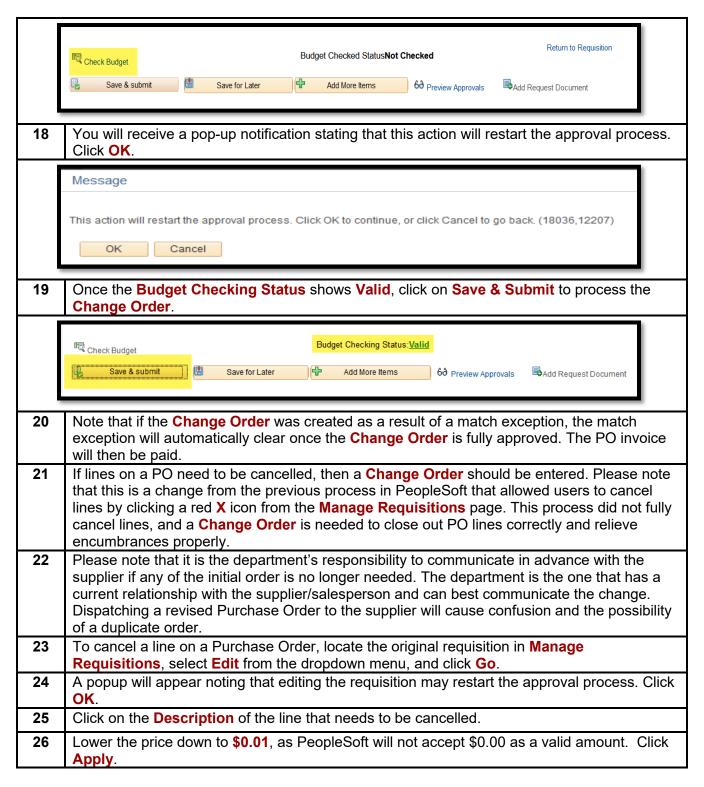| 20	Note that if the **Change Order** was created as a result of a match exception, the match exception will automatically clear once the **Change Order** is fully approved. The PO invoice will then be paid.
21	If lines on a PO need to be cancelled, then a **Change Order** should be entered. Please note that this is a change from the previous process in PeopleSoft that allowed users to cancel lines by clicking a red **X** icon from the **Manage Requisitions** page. This process did not fully cancel lines, and a **Change Order** is needed to close out PO lines correctly and relieve encumbrances properly.
22	Please note that it is the department's responsibility to communicate in advance with the supplier if any of the initial order is no longer needed. The department is the one that has a current relationship with the supplier/salesperson and can best communicate the change. Dispatching a revised Purchase Order to the supplier will cause confusion and the possibility of a duplicate order.
23	To cancel a line on a Purchase Order, locate the original requisition in **Manage Requisitions**, select **Edit** from the dropdown menu, and click **Go**.
24	A popup will appear noting that editing the requisition may restart the approval process. Click **OK**.
25	Click on the **Description** of the line that needs to be cancelled.
26	Lower the price down to **$0.01**, as PeopleSoft will not accept $0.00 as a valid amount. Click **Apply**.

27	Click **Checkout** at the top of the screen to return to the requisition screen.
28	In the **Comments** section, click on the **speech bubble** to enter in a line comment.
29	Enter **CANCEL LINE** in the comment and then click **OK** to note the reason for the **Change Order**.

30	Click the **Check Budget icon** at the bottom of the screen. A popup will appear noting that this action will restart the approval process. Click **OK**.
31	Once the budget returns as valid, click the **Save & submit** option.

32	Once your **Change Order** has been processed, the enterer will receive an email noting that their **Change Order** has been approved.
33	Please note that the **Change Order** process is a multi-step process for Procurement and approving the **Change Order** is only the first step. Typically, it will take at least one hour from the email approval notification to the final step of the **Change Order** process.