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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.

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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.

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.

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

| 13 | To add a new line to the requisition, click the **Add More Items** button. |

| 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. |

| 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	When adding a line, click on the **Details** icon to ensure that any services, using the Unit of Measure of Lot, have the **Amount Only** box selected. Goods, using the Unit of Measure of Each, should NOT have the Amount Only box selected.

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

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

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

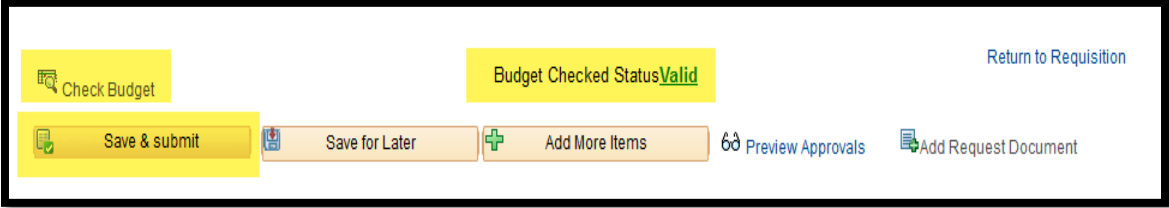| 21	Note that if the **Change Order** was created as a result of a match exception, the match exception will automatically be cleared once the **Change Order** is fully approved. The PO invoice will then be paid.
22	Occasionally, lines on a PO may need to be cancelled because the goods/services are no longer needed, the GL account listed for the line is incorrect, or because the unit of measure for the line is incorrect. Please note that once the line has been approved, it cannot be fully cancelled but it can be reduced to either $1.00 or the amount that has already been paid against that line.
23	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.

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24	To cancel a line on a Purchase Order, locate the original requisition in **Manage Requisitions**, select **Edit** from the dropdown menu, and click **Go**.
25	A popup will appear noting that editing the requisition may restart the approval process. Click **OK**.
26	Click on the **Description** of the line that needs to be cancelled.
27	Lower the price down to **$1.00**, as PeopleSoft will not accept $0.00 as a valid amount. Click **Apply**.

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

31	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**.

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32	Once the budget returns as valid, click the **Save & submit** option.
33	Once your **Change Order** has been processed, the enterer will receive an email noting that their **Change Order** has been approved.
34	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.