



Step	Action
Navigation: eProcurement – Manage Requisitions	
1	<p>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.</p> <p>Hint: Change Orders cannot be processed on orders from the OU Marketplace. Contact the Marketplace supplier directly for any changes/issues with an order.</p>
2	<p>Change Orders <u>cannot</u> 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.</p>
3	<p>Change Orders <u>cannot</u> 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.</p>
4	<p>Change Orders <u>cannot</u> 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.</p>
5	<p>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.</p>
6	<p>To process a Change Order, click on the eProcurement tile on the Home Screen and select Manage Requisitions on the left side menu.</p>
7	<p>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.</p>
8	<p>Once the requisition has been located, click the Select Action dropdown menu, select Edit, and click the Go button.</p>



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: OUHSC Requisition Name: _____
 Requisition ID: _____ Request State: All but Complete Budget Status: _____
 Date From: 05/21/2020 Date To: 07/31/2020
 Requester: _____ Entered By: _____ PO ID: _____

Search Clear Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000000268	SV RECEIVE REQ 3	OUHSC	05/22/2020	Received	Valid	225.00 USD	[Select Action] Go
▶ 0000000267	SV RECEIVE REQ 2	OUHSC	05/22/2020	Pending	Valid	225.00 USD	[Select Action] Go
▶ 0000000266	SV RECEIVE REQ 1	OUHSC	05/22/2020	Pending	Valid	225.00 USD	[Select Action] Go
▶ 0000000265	0000000265	OUHSC	05/22/2020	Received	Valid	1,000.00 USD	[Select Action] Go
▶ 0000000264	0000000264	OUHSC	05/22/2020	PO(s) Dispatched	Valid	2,600.00 USD	[Select Action] Go
▶ 0000000263	0000000263	OUHSC	05/22/2020	Open	Valid	49.00 USD	Approvals Copy Edit Go
▶ 0000000262	0000000262	OUHSC	05/22/2020	Open	Valid	1,000.00 USD	Receive View Print Go
▶ 0000000261	2020-05-22 535039 03	OUHSC	05/22/2020	PO(s) Dispatched	Valid	132.15 USD	[Select Action] Go
▶ 0000000260	2020-05-22 535039 02	OUHSC	05/22/2020	PO(s) Dispatched	Valid	259.50 USD	[Select Action] Go

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**.

Message

This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)

Click OK to continue, or click Cancel to go back.

OK Cancel

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: OU Health Sciences Center Requisition Name:
 Requester: Requisition ID: 000024478
 Currency: USD Priority: [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		
2	Tax Consulting Services	KPMG LLP	1.00	Batch Lot	10000.00	10000.00		
3	Preparation of Additional Tax	KPMG LLP	1.00	Batch Lot	3,500.00	3500.00		

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:
 *Price: *Currency:
 *Quantity: *Unit of Measure:
 *Category: Due Date:

Supplier

*Supplier ID:
 Supplier Name: 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.



Cart Summary: Total Amount 28,970.00 USD

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

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 OU Health Sciences Center Requisition Name

Requester Requisition ID

Currency Priority [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 Search Advanced Search

Web [Browse Supplier Websites](#) **Requisition** [Create a non-catalog request](#) [OU Marketplace](#)

15 Note that when adding a new line, the supplier information will not 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.



Home My Preferences Requisition Settings | 3 Lines Checkout

Search All Search Advanced Search

Requisition ?

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

Item Details

*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

*Supplier ID Supplier Name

Additional Information

Send to Supplier Show at Receipt Show at Voucher

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

Home My Preferences Requisition Settings | 3 Lines Checkout

Search All Search Advanced Search

Requisition ?

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

Item Details

*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

*Supplier ID Supplier Name

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Edit Shopping Cart

Description	Qty	UOM
Preparation of Form 990T ...	1	LOT
Tax Consulting Services	1	LOT
Preparation of Additional...	1	LOT
Total Lines	3	
Total Amount (USD)	28970.00	

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.

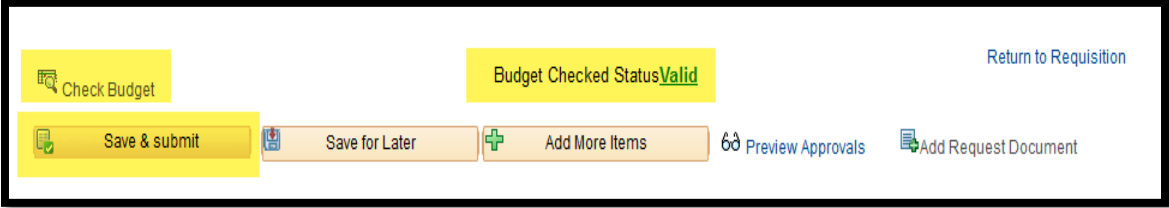


- 24 To cancel a line on a Purchase Order, locate the original requisition in **Manage Requisitions**, select **Edit** from the dropdown menu, and click **Go**.
- 25 A popup will appear noting that editing the requisition may restart the approval process. Click **OK**.
- 26 Click on the **Description** 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**.



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.