



Step	Action
<b>Navigation: eProcurement – Manage Requisitions</b>	
1	<p>A <b>Change Order</b> is a request to modify an existing Purchase Order. Most <b>Change Orders</b> are requested due to an additional need in quantity or amount for an existing PO. When processing <b>Change Orders</b>, the changes should reflect the needs for the rest of the fiscal year.</p> <p><b>Hint:</b> <b>Change Orders</b> cannot be processed on orders from the OU Marketplace. Contact the Marketplace supplier directly for any changes/issues with an order.</p>
2	<p><b>Change Orders</b> can be submitted to both increase one line and decrease another. A previous system issue with PeopleSoft required two separate <b>Change Orders</b> to be entered to recognize changes in both lines, but that issue has been resolved.</p>
3	<p>Note that PeopleSoft will not allow existing lines on a requisition to be deleted, but they can be reduced or cancelled if they have not been received on. For example, if you had a requisition line for five chairs at \$100 each but only three chairs have been received and no more are available from the supplier, you could create a change order to reduce the line by \$200, but you could not cancel the line because part of the order has been received/paid.</p>
4	<p><b>Change Orders</b> 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.</p>
5	<p><b>Change Orders</b> 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 PO's to the original supplier must be closed and new requisitions should be entered to the updated supplier name/ID.</p>
6	<p><b>Change Orders</b> are usually prompted by the inability to properly receive on 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>
7	<p>To process a <b>Change Order</b>, click on the <b>eProcurement</b> tile on the <b>Home Screen</b> and select <b>Manage Requisitions</b> on the left side menu.</p>
8	<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 <b>Requisition ID</b>, if known, or update the <b>Date From</b> and <b>Date To</b> field to locate the correct requisition. Click <b>Search</b>.</p>
9	<p>Once the requisition has been located, click the <b>Select Action</b> dropdown menu, select <b>Edit</b>, and click the <b>Go</b> 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

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**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

10 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 longer 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

11 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](#)

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**Requisition Summary**

Business Unit:  OU Health Sciences Center      Requisition Name:   
 Requester:       Requisition ID: 000024478  
 Currency: USD      Priority:  [Purchasing Comments](#)

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**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

**12** 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](#)

**13** 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

14 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**

15 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  Requisition

Browse Supplier Websites    Create a non-catalog request

[OU Marketplace](#)

16 Note that when adding a new line, the supplier information will not copy 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

17 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
<b>Total Lines</b>	<b>3</b>	
<b>Total Amount (USD)</b>	<b>28970.00</b>	

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



Check Budget
 [Return to Requisition](#)

Budget Checked Status: **Not Checked**

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

Message

This action will restart the approval process. Click OK to continue, or click Cancel to go back. (18036,12207)

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

Check Budget
 **Budget Checking Status: Valid**

**21** 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.