

PROCUREMENT: Change Orders

Overview

- This job aid is intended for all Ignite users who have created a requisition and would like to make a change to the Purchase Order.
- When would you need to initiate a change order?
 - If you have recently submitted a requisition and a purchase order has been created by the Buyer, but you would like to make a change to the PO. In order to do this, you must enter through the requisition originally created to perform a change order.
- Change orders should only be created for non-catalog requisitions (goods and services). If you need a change order for a Marketplace requisition, please contact the Buyer associated with your requisition.
- Change orders should be discussed with the supplier if a revised quote has not first been provided.
- Change orders cannot be made to someone else's PO. If that is the case, a new requisition should be entered and include "SUPPLEMENT TO PO ORDxxxxx" and provide the original Order #.

The following items **cannot** be modified via the requisition:

- Line Type
- Category
- UOM
- Currency
- Adding a line
- Negotiated flag
- Requisition number
- PO Charge Account (CoA)
- POETAF

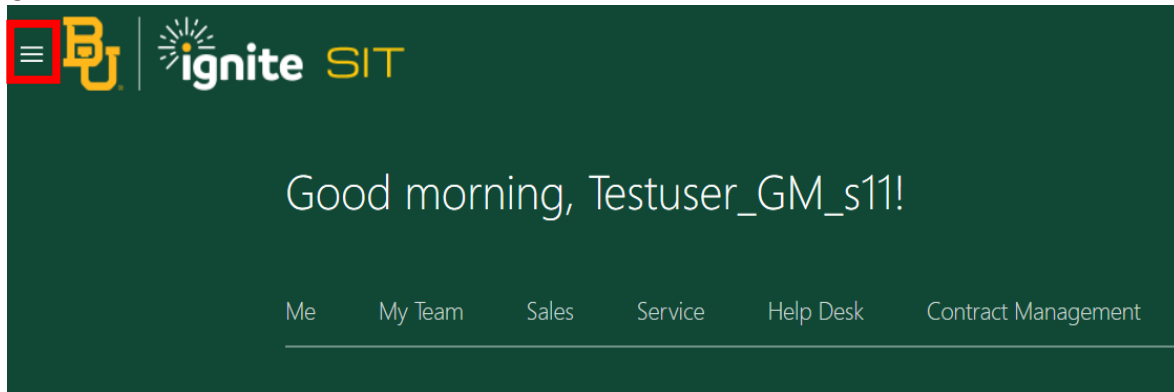
These items **can** be modified via the requisition:

- Delete (remove line)
- Price
- Line Number
- Line Description
- Quantity
- Total (dollar amount), Ordered (dollar amount), & Total Tax changes if other fields change
- Location
- Requested Delivery Date
- Promised Delivery Date
- Shipping Method
- Requester
- Deliver-to Location
- Change Reason
- Tax-Related
- Attachments
- Notes to Supplier

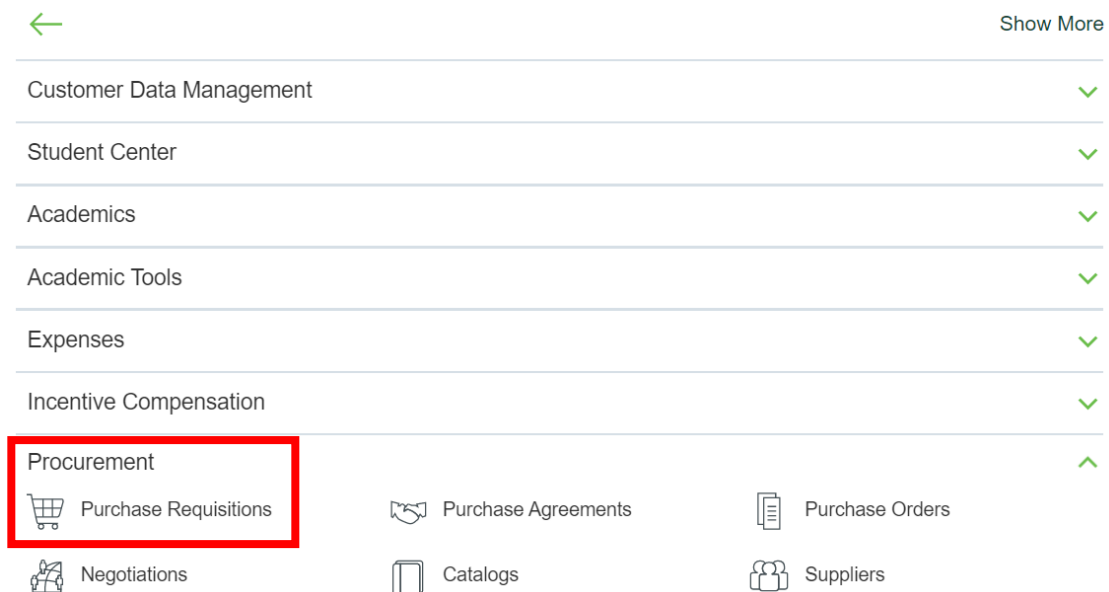
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I. Navigate to Requisition Page

- I. You can access the **Purchase Requisitions** task in two ways:
 - a. (Option I) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

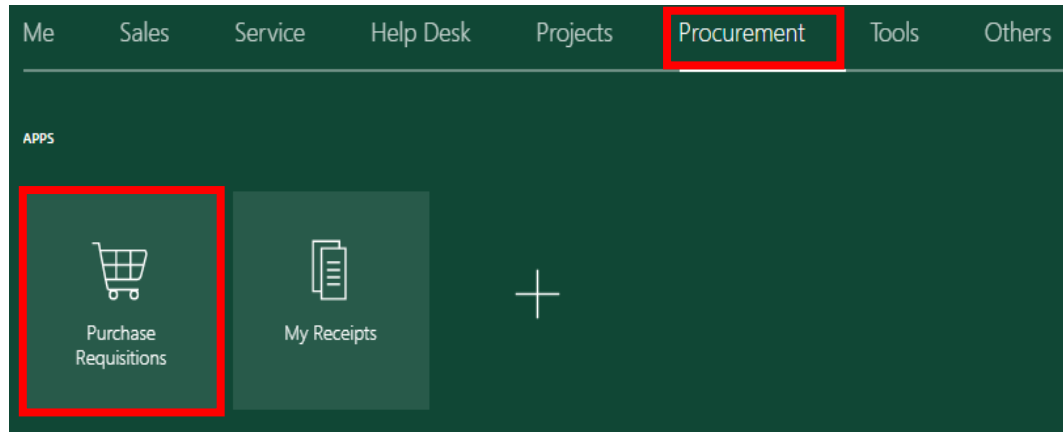


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



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- c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



2. Initiate a Change Order

- I. Navigate to **Manage Requisitions**.



Recent Requisitions		View More
REQ0000530	Lab Chemicals	Pending approval
REQ0000527	chairs for new employees	Pending approval
REQ0000520	Royalties	Approved
REQ0000518	Dell Standard 19 Inch Monitor	Pending approval
REQ0000517	Dell Standard 19 Inch Monitor	Pending approval

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2. Select the **requisition number** you wish to change. As previously referenced, the PO must be created and open, which you can see from the order number.

Manage Requisitions

Done

Search

Advanced Manage Watchlist Saved Search Requisitions | Entered

Requisitioning BU

** Entered By

** Requisition

Description

Created

Status

Requester

** Supplier

Order

** Item

Requisitions Requiring Attention

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ0000511	Super computer	2/20/20	5,410.00 USD	Approved	Liquidated	ORD0000141

3. Select the **Actions** dropdown and click **Edit Order**.

Requisition: REQ0000511

Requisitioning BU BAYLOR
Entered By Dr. Jane Smith
Description Super computer
Creation Date 2/20/20
Status Approved
Justification

Check Funds View Life Cycle **Actions** Done

- Duplicate
- Cancel Requisition
- Reassign
- View Document History
- View PDF
- Edit Order**

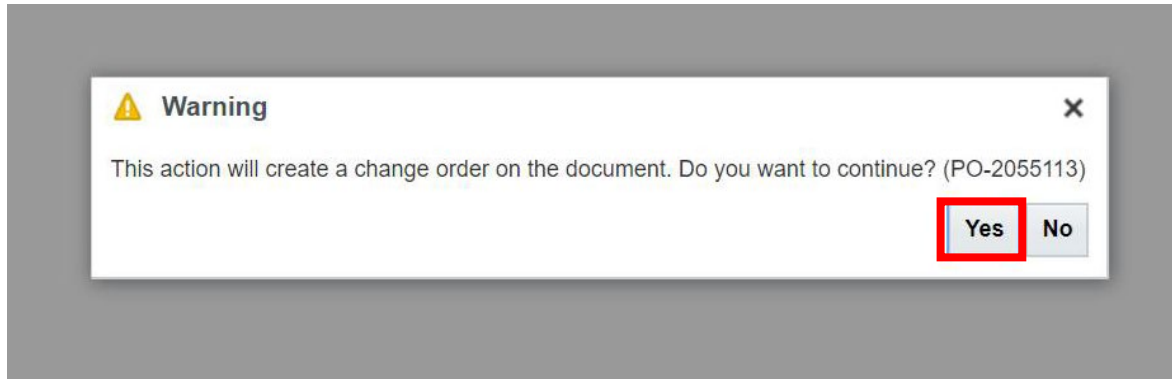
Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1		Super computer	Computer Hardware	1	EA	5,410.00 USD	5,410.00	Approved	Liquidated	ORD0000141	

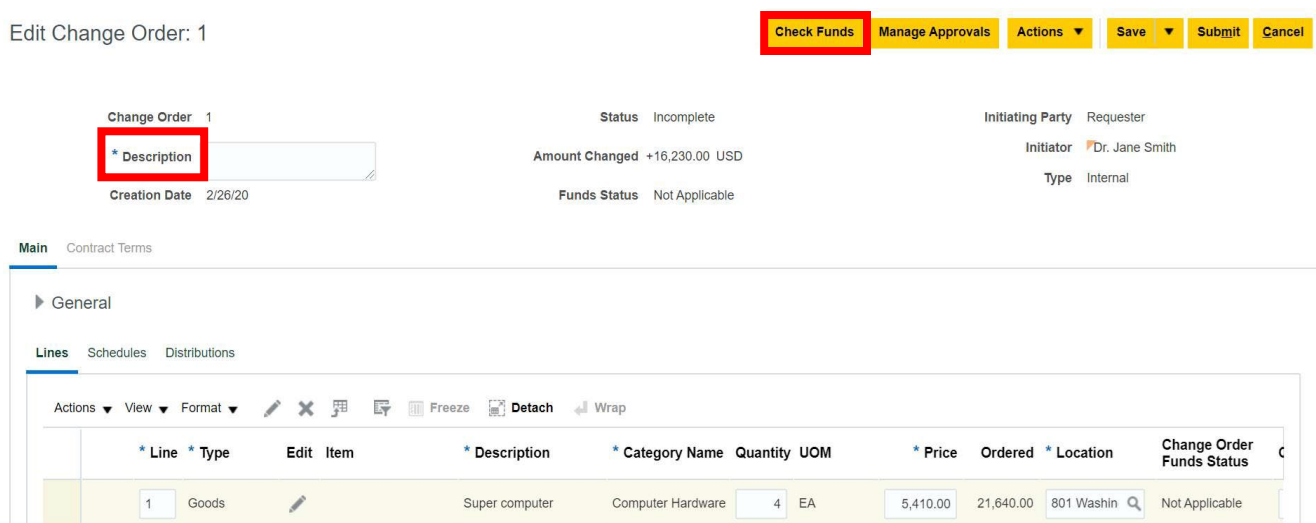
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4. On the pop-up select **Yes**.

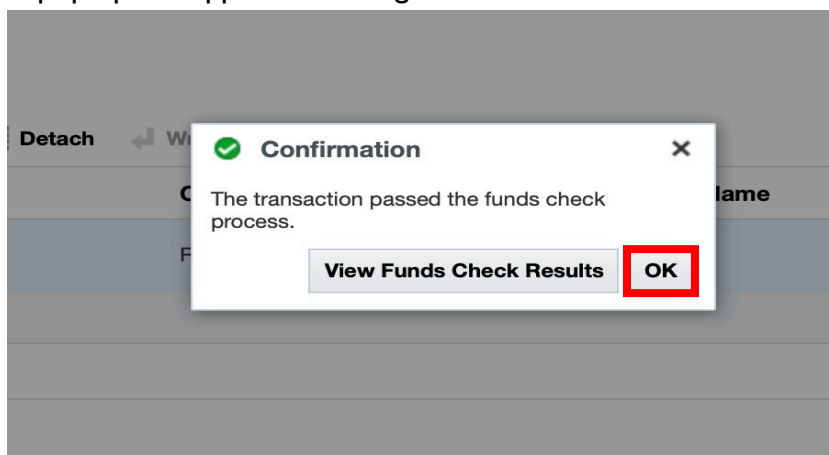


5. Edit the necessary information. A **description** of the change is required on this page (i.e. more students were added to the lab, so 3 additional computers are needed). Once the information is entered, select **Check Funds**.

Edit Change Order: 1

A screenshot of a web application interface for editing a change order. At the top right, there is a navigation bar with buttons: "Check Funds" (highlighted with a red box), "Manage Approvals", "Actions", "Save", "Submit", and "Cancel". Below this, the form displays details for "Change Order 1". A red box highlights the "* Description" field. Other fields include "Creation Date" (2/26/20), "Status" (Incomplete), "Amount Changed" (+16,230.00 USD), "Funds Status" (Not Applicable), "Initiating Party" (Requester), "Initiator" (Dr. Jane Smith), and "Type" (Internal). Below the form, there is a table with columns: "Line", "Type", "Edit", "Item", "Description", "Category Name", "Quantity", "UOM", "Price", "Ordered", "Location", and "Change Order Funds Status". The table contains one row with the following data: Line 1, Goods, Super computer, Computer Hardware, 4, EA, 5,410.00, 21,640.00, 801 Washin, Not Applicable.

6. A pop-up will appear indicating whether the funds are available. Select **OK**.



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7. Select **Submit**.

Edit Change Order: 1

Check Funds Manage Approvals Actions Save **Submit** Cancel

Change Order 1 Status Incomplete Initiating Party Requester

* Description Adding additional computers Amount Changed +16,230.00 USD Initiator Dr. Jane Smith

Creation Date 2/26/20 Funds Status Not Applicable Type Internal

Main Contract Terms

General

Lines Schedules Distributions

Actions View Format Edit Item Freeze Detach Wrap

* Line	* Type	Edit	Item	* Description	* Category Name	Quantity	UOM	* Price	Ordered	* Location	Change Order Funds Status
1	Goods			Super computer	Computer Hardware	4	EA	5,410.00	21,640.00	801 Washin	Not Applicable

8. On the confirmation pop-up, select **OK**. The change order has now been submitted.

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Confirmation

The change order 1 for document Purchase Order number ORD0000141 was submitted for approval.

OK

Amount 5,41
Amount 5,41
Funds Status Liqu
Attachments None