Change Orders…

Once a purchase order is dispatched, any changes or cancellations to the order must be made through a formal request known as a Change Order. Change Orders can only be submitted to change or cancel:

- Open or Active line items;
- of a ‘Dispatched’ purchase order;
- in the current fiscal year.

The following sections summarize how to verify each of these Change Order criteria.

Note: Changes to budget-checked accounting data must be made through an Electronic Interproject-grant Invoice (EI); accounting data cannot be changed through a Change Order.

Verifying Dispatched Status & Fiscal Yr

Access the Header panel for the PO: select Go, Administer Procurement, Manage Purchase Orders, then select Inquire, Purchase Order, Header. The Status field and Acctg Date field identify the status of the PO and reveal whether the PO falls within the current fiscal year, respectively.

Checking Line Item Status

To verify that the line items you wish to change or cancel through a Change Order are open or active, select Go, Administer Procurement, Manage Purchase Orders, then select Inquire, Purchase Order, Distrib. Scroll to the line you wish to verify and click the More Distrib Info button. The value shown in the Status field identifies the status of the current line.

Line Received, Invoiced, or Matched?

To check whether receiving, invoicing, or matching has occurred, select Go, Administer Procurement, Manage Purchase Orders, then select Inquire, PO Activity Summary. Scroll to the line you wish to check and click Fetch. The values under Receipt, Invoice, and Matched show receiving, invoicing, and matching activity for the current line.

Changing a Line in a PO

The Open and Active lines of a dispatched PO in the current fiscal year can be changed through a Change Order. To change a line:

1. Select Go, Administer Procurement, Manage Purchase Orders, and then Use, Purchase Order, Lines, Update/Display from the menu bar.
2. Click Line Fetch to retrieve the PO line items.
3. On the Header panel, click Create Header Change and verify the dispatch method.
4. On the Lines panel, click Line Details to open the Line Details panel for the line item you wish to change. Click Create Line Change and click OK.
5. On the Lines panel, make any necessary changes to the line item’s Item Description, UOM, and/or PO Qty field values.
6. To change an item’s price: on the Schedule panel click Load Schedules and click Schedule Details to open the line item’s Schedule Details panel, click Create Schedule Change, and change the item’s price in the Price field on the Schedule panel.
7. Repeat steps 4 through 6 for each item in the purchase order that requires a change.
8. On the Comments panel, click Load Comments, check the Send to Vendor checkbox, and enter a descriptive comment that summarizes the changes you have made to the purchase order.
9. Click the Save toolbar button to save the modified purchase order.
10. Select Use, Amount Approval, Approval, enter any comments or details for the approver of this changed purchase order, and click the Save button to route the purchase order to the next approver.

Canceling a PO

Before canceling a dispatched PO, consider the following:

- If invoicing and/or matching has occurred for any of the PO line items, the PO cannot be canceled. You may, instead, cancel the line items on the PO that have yet to be invoiced and matched.
- If line items of the dispatched PO have been ‘Received’ in the system, the Receiver can be canceled to allow for the cancellation of the entire PO. Refer to ‘Canceling a Receiver or Receiver Line’ on page 150 of the Purchasing Department User Manual for more information.

Important! To send a notice of cancellation to the vendor, click Create Header Change and then click Save on the Purchase Order Header panel, before canceling the PO.

To cancel an entire purchase order:

1. Select Go, Administer Procurement, Manage Purchase Orders, and then Use, PO Workbench from the menu bar.
2. Click the Select button, enter the PO number in the PO field, and click OK.
3. Check the checkbox for the PO you wish to cancel.
4. Click Cancel to cancel the ‘checked’ PO.
5. Click Yes to cancel the selected purchase order, then click Yes to verify the PO cancellation; the purchase order is canceled.

Note: If you are canceling a PO that was sourced from a requisition, you will receive the message: Open requisition quantity to be sourced again? Click No to indicate that you do not wish to resource the requisition into a new purchase order.
Purchasing Inquiries

Current Processors

After an order is saved and its approval initiated, you can perform a Current Processors inquiry to determine who is currently working on your order. To inquire on a document’s current processor, select either Inquire, Req Current Processor or Inquire, PO Current Processor from the menu bar.

Approval Process Inquiry

The Approvals Process panel shows the required approval path for a requisition or PO. To access this panel, select Use, Amount Approval, and then select the appropriate Approval Process panel (Req or PO) from the Requisition Items or Manage Purchase Orders window menu bar.

Budget Control Exceptions

The data on the Budget Control Exceptions panel can help identify the cause for a budget checking error. It is opened by selecting Use, Budget Control Exceptions from either the Requisition Items or the Manage Purchase Orders window menu bars.

Refer to the Purchasing Department User Manual for an explanation of the budget checking codes.

PO Cross Reference

The PO Cross Reference inquiry is used to cross-reference the purchase orders that were dispatched for a particular requisition. To initiate this inquiry, select Go, Administer Procurement, Requisition Items and then select Inquire, PO Cross Reference.

POs Requiring Receiving

The POs Requiring Receiving inquiry enables you to generate a list of all purchase orders that require acknowledgement in the system. It is initiated by selecting Inquire, POs Requiring Receiving from the Manage Shipments window menu bar.

Use Next and Previous in List toolbar buttons to ‘page’ through the POs that require receiving.

PO Document Status

PO Document Status inquiry lists the documents in the procure-to-pay process for a particular PO. To initiate this inquiry, select Go, Administer Procurement, Manage Purchase Orders and then select Inquire, PO Document Status Inquiry.