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.

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

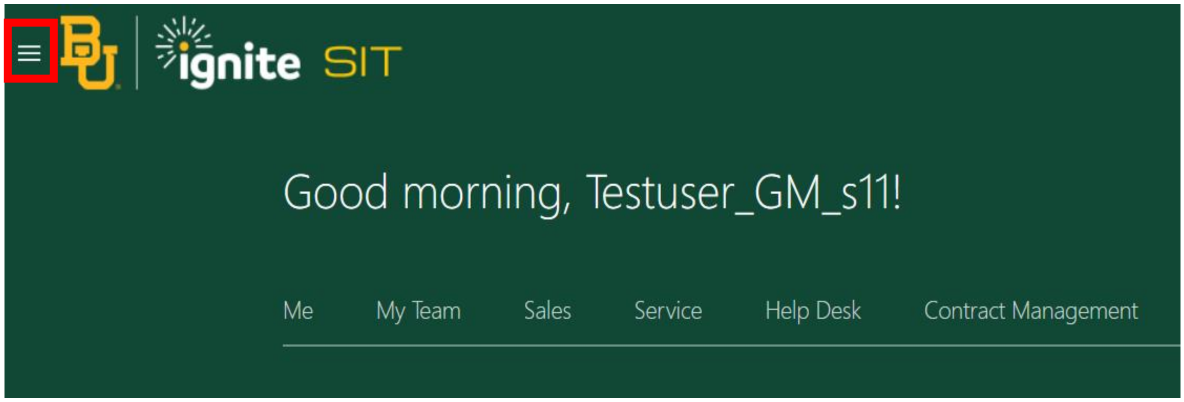
- Line Type
- Category
- UOM
- Currency
- Negotiated flag
- Requisition number
- PO Charge Account (CoA)
- POETAF

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

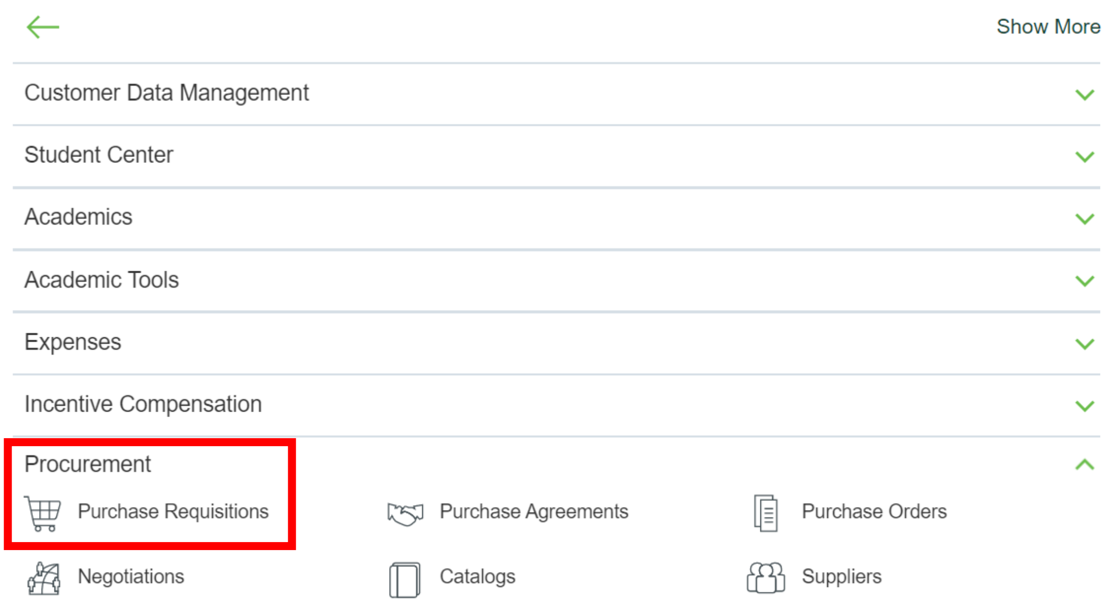
- Delete (remove line)
- Price
- Line Number
- Line Description
- Quantity
- Total (dollar amount), Ordered (dollar amount), & Total Tax changes if other fields change
- Location
- Requested Delivery Date
- Promised Delivery Date
- Shipping Method
- Requester
- Deliver-to Location
- Change Reason
- Tax-Related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

1. Navigate to Requisition Page

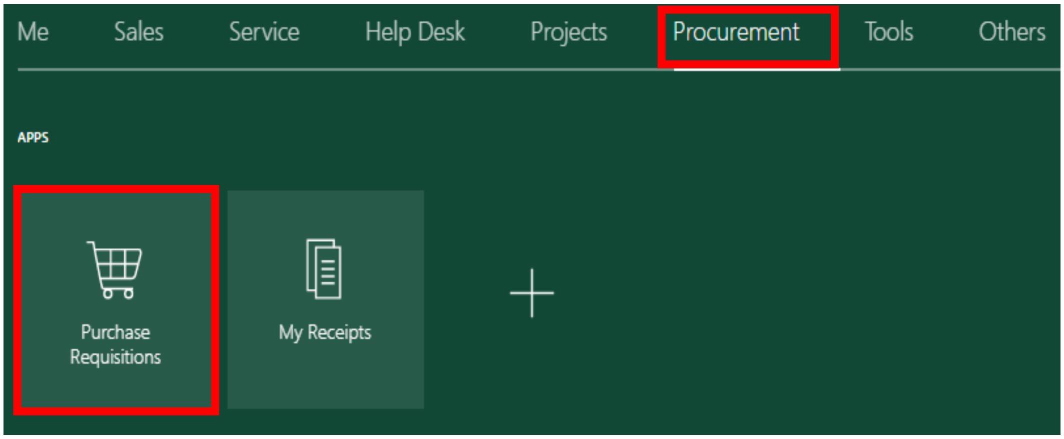
1. You can access the **Purchase Requisitions** task in two ways:
   a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



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

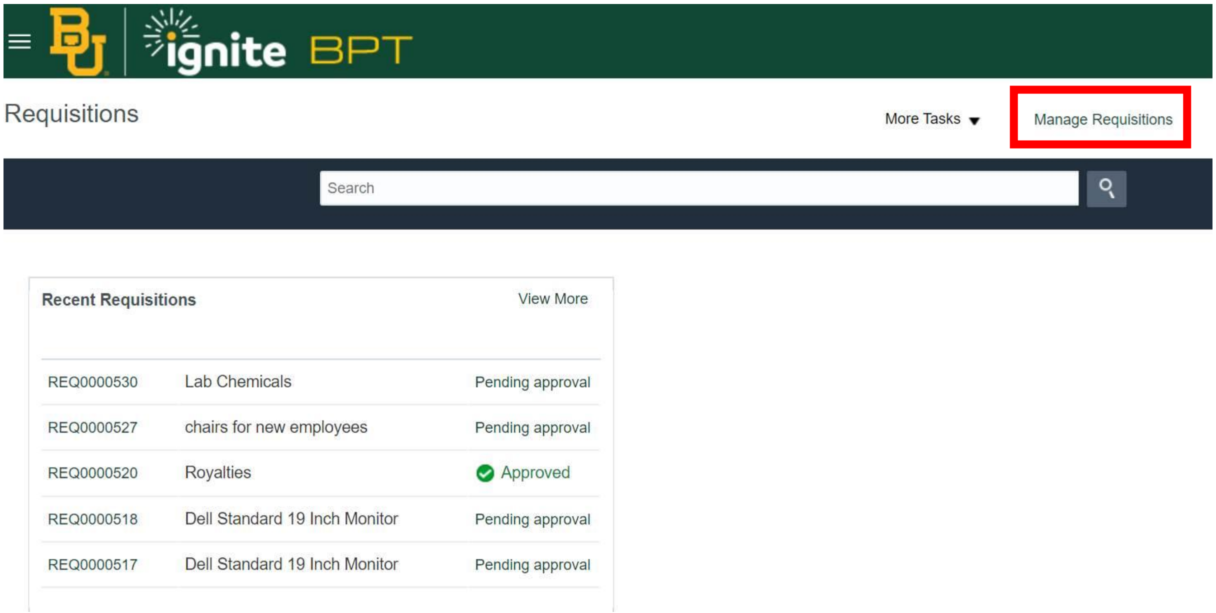


c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.

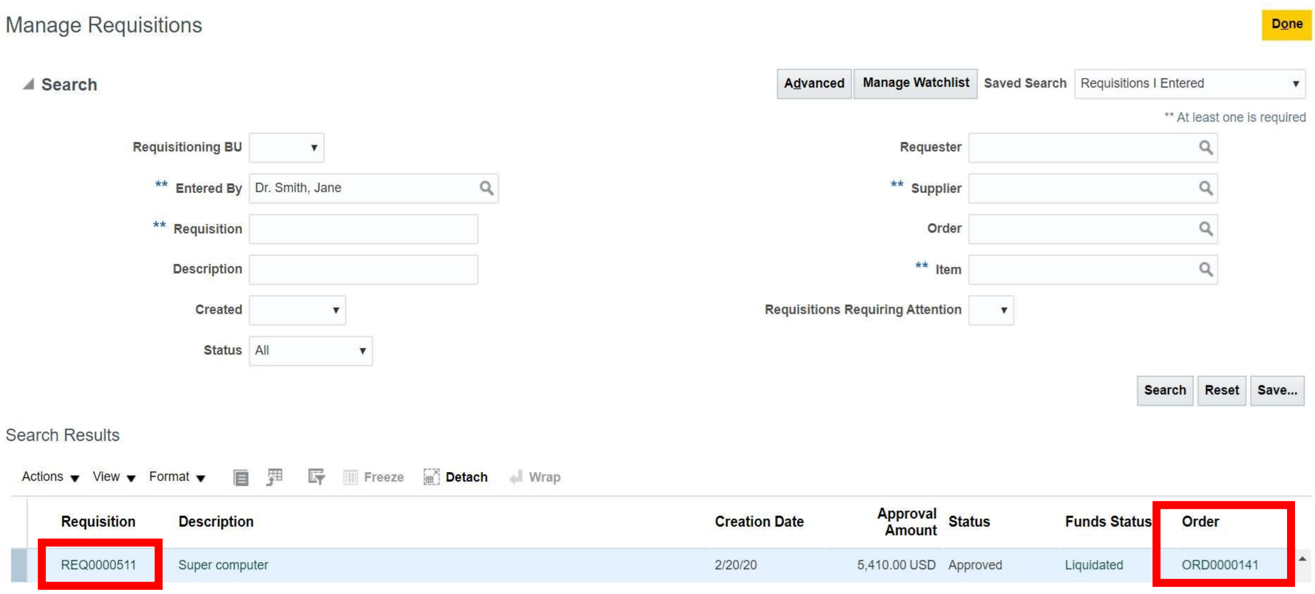


2. Initiate a Change Order

1. Navigate to **Manage Requisitions**.

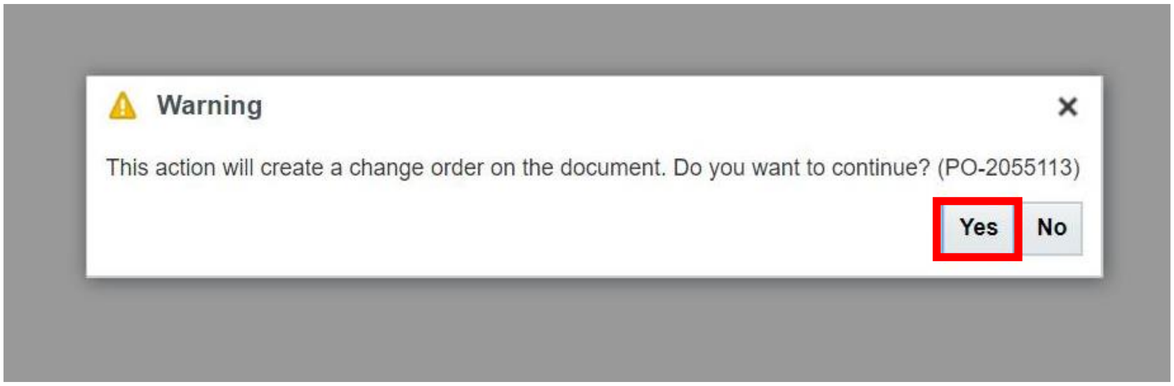


2. Select the **requisition number** you wish to change. As previously referenced, the PO must be created and open, which you can see from the order number.

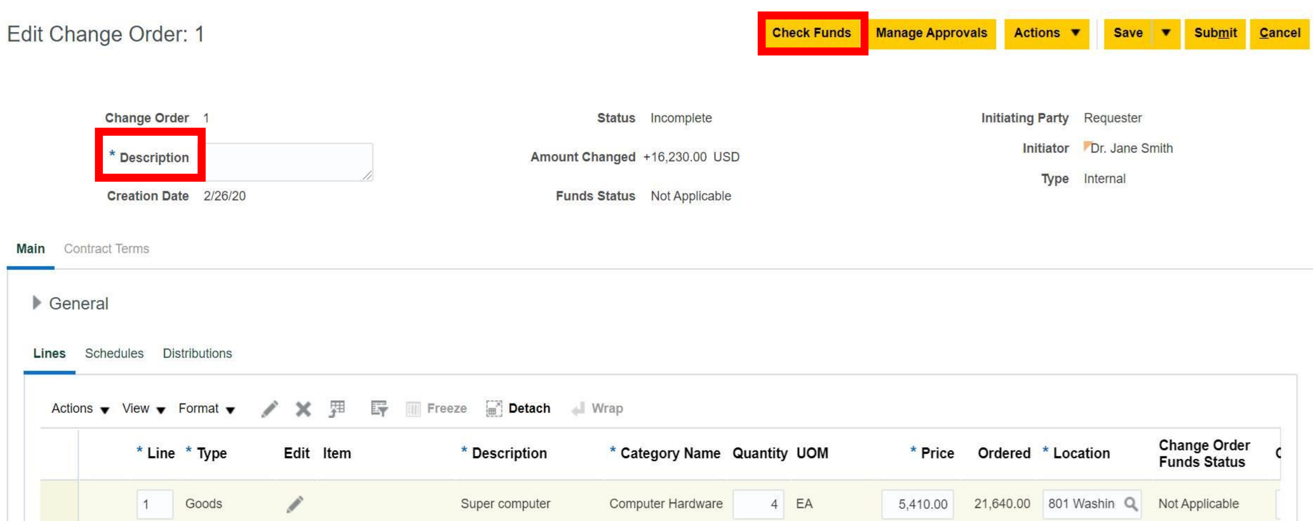


3. Select the **Actions** dropdown and click **Edit Order**.

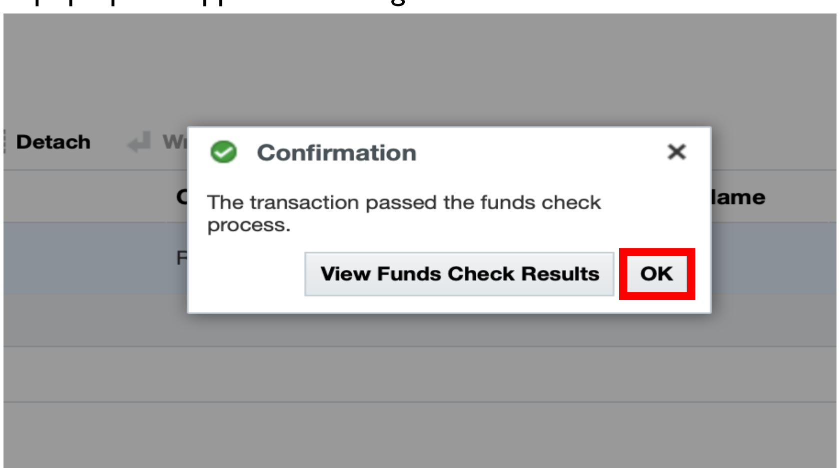
4. On the pop-up select **Yes**.



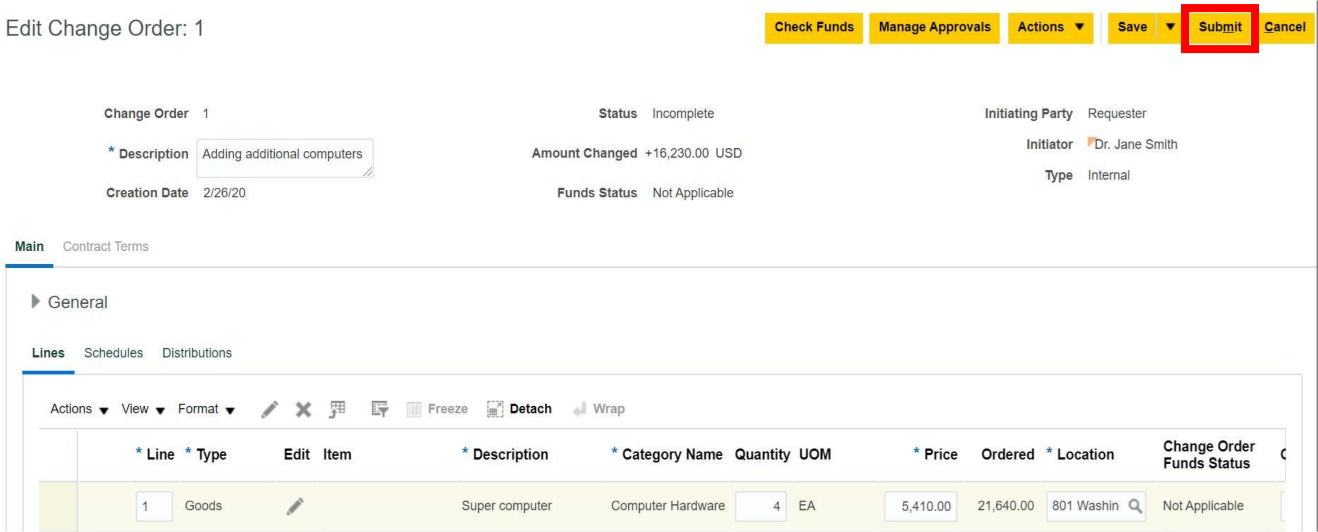
5. Edit the necessary information. A **description** of the change is required on this page (i.e. more students were added to the lab, so 3 additional computers are needed). Once the information is entered, select **Check Funds**.



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



7. Select **Submit**.



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