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BFS PO Change Order

PO Change Order
The definition of a PO Change Order is a revision made to a Purchase Order by a department processor or a Buyer

- Changes made to POs’ are tracked within the BFS system
- PO Change Orders are routed through workflow and approved via the worklist
- A change to a PO should only be made when the PO is in a status of “Dispatched” or “Pending Approval”

PO Change Order Overview
The following Purchase Order types do not require Buyer involvement and can be made by the departments

- **Direct to Vendor**
  The PO is sent directly to the vendor for goods or services under $5,000

- **Subaward**
  Research agreement between UCB and other entities to conduct research on behalf of UCB

- **After the fact**
  When the department creates a requisition after goods and services have been ordered

- **DEPT_POCNV**
  Converted POs that were created by the Departments in 8.8. This new type allows the departments to create change orders if needed

Departments cannot change Purchase Orders for the following types:

- **POCNV** – conversion purchase orders
- **Buyer ID** – campus or departmental Buyer
- **Special Handling** - campus or department Buyer

Change Orders for Catalog shopping **ePro** require the following:

- A new order is required If the change needed affects the vendor, e.g.
  - quantity changes
  - amount changes
- If the change does not affect the vendor it can be performed e.g..
  - chartfield changes
  - comments
The most common PO Change Orders are identified as those listed below. Topics have been recorded under the “Create PO Change Orders” section for each scenario:

- Change PO Amount with or without vouchers
- Change Quantity with or without vouchers
- Change Chartfield/Distribution
- Correct Sales/Use Tax
- Change PO Lines to Amount Only with or without vouchers
- Change Vendor Address Location
- Cancel a PO

The following depicts an overview of PO Change Order process flow for review:

**Look Up Existing Vouchers for a PO**

The process to conduct PO Change Order may vary for a scenario depending on the preexistence of vouchers for the PO being changed. This topic provides instruction on how to look up vouchers for a PO. As a matter of practice you should look to see if vouchers exist to determine which training scenario to follow to process a PO Change Order.

**Procedure**

In this example, we learn the navigation and pages required to determine if vouchers exist for a PO prior to conducting a PO Change Order.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Log into BFS. The BFS menu is displayed.  
|      | Click the **Purchasing** link.           |
2. Click the **Purchase Orders** link.

3. Click the **Review PO Information** link.

4. Click the **Activity Summary** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Enter the desired information into the <strong>PO Number: field</strong>. Enter a valid value e.g. ”2000001252”.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>7.</td>
<td>The <strong>Activity Summary</strong> page is displayed. Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>The <strong>Details</strong> tab shows the description of the items ordered on the PO. To view vouchers/invoices that may have been entered into BFS for the PO Click the <strong>Invoice</strong> tab.</td>
</tr>
<tr>
<td>9.</td>
<td>The <strong>Invoice</strong> tab is displayed. Note that an amount of <strong>$153.23</strong> has been invoiced for the PO. There is a remaining amount of <strong>$646.77</strong> to be invoiced. To view the related voucher number assigned to the voucher Click the <strong>Invoice</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>The voucher number is displayed for the amount invoiced. If a PO Change Order is needed and vouchers are present then specific steps must be followed to make changes. Refer to the topics listed under &quot;Create PO Change Orders&quot; to determine which scenario to follow that best meets your PO Change Order need.</td>
</tr>
<tr>
<td>11.</td>
<td>This completes the lesson <strong>End of Procedure</strong>.</td>
</tr>
</tbody>
</table>
Print or Email PO Change Order
The following topic illustrates how an Official copy of a PO Change Order can be emailed to the Vendor if their email address was not pre-populated or needs to be changed. Also the functionally allows the user to enter their own email address if the vendor does not accept emails. This workaround will allow you to receive the email with the attached Official PO for Printing to later mail, fax or retain for your own records.

Procedure

In this example the Dispatch Method of Email is selected to send the Official PO information to the vendor or yourself for printing.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Dispatch Method list.</td>
</tr>
</tbody>
</table>

Print or Email PO Change Order
The following topic illustrates how an Official copy of a PO Change Order can be emailed to the Vendor if their email address was not pre-populated or needs to be changed. Also the functionally allows the user to enter their own email address if the vendor does not accept emails. This workaround will allow you to receive the email with the attached Official PO for Printing to later mail, fax or retain for your own records.

Procedure

In this example the Dispatch Method of Email is selected to send the Official PO information to the vendor or yourself for printing.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Dispatch Method list.</td>
</tr>
</tbody>
</table>

Print or Email PO Change Order
The following topic illustrates how an Official copy of a PO Change Order can be emailed to the Vendor if their email address was not pre-populated or needs to be changed. Also the functionally allows the user to enter their own email address if the vendor does not accept emails. This workaround will allow you to receive the email with the attached Official PO for Printing to later mail, fax or retain for your own records.

Procedure

In this example the Dispatch Method of Email is selected to send the Official PO information to the vendor or yourself for printing.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Dispatch Method list.</td>
</tr>
</tbody>
</table>
2. ****As a Reminder: The information displayed below was given in other PO Change Order topics related to selection of the Dispatch Method: In this Topic we will be covering the Dispatch Method Email Option.

The value displayed for the Dispatch Method on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.

1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.

2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for After the Fact or Subaward POs.

**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide for detailed instruction.

**Do not use the following values:**
**EDX** - not used for PO Change Orders
**Fax** - not used for PO Change Orders
**Phone** - not used for PO Change Orders
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | The **Email** option is selected if you would like a copy of the official PO for your records or to send to the vendor.  
Point to the **Email** list item. |
<p>| 4.   | <strong>Click the Email list item.</strong> |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>To set up the email address to send the official PO the Header Defaults link is accessed. Click the <strong>Header Details</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 6.   | The following warning message is received if the vendor does not have an email address set up for the PO. The message should be bypassed.  

Click the **OK** button. |
| 7.   | The **PO Header Details** page is displayed. If the Vendor had an email address that was set up for dispatch of the PO it would be set-up under the **Vendor/Contact Fax/Email** heading.  

To send the Official PO to a vendor supplied email address or to add your email address so that you receive the PO information for printing to later fax or mail if the vendor does not accept emails the information is entered under the **One Time Fax/Email** heading  

**Note:** if multiple email addresses are required, they are separated by a semicolon  

When the Dispatch process is ran an email(s) is generated, a copy of the Official PO is attached.  

**Note:** The address(s) entered under the **One Time Fax/Email** heading will override the address listed under the **Vendor/Contact Fax/Email** during the Dispatch process. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click in the <strong>Email Address</strong> field.</td>
</tr>
<tr>
<td>9.</td>
<td>In this example a single email address is entered. Enter the desired information into the <strong>Email Address</strong> field. Enter a valid value e.g. “<a href="mailto:oski@berkeley.edu">oski@berkeley.edu</a>”.</td>
</tr>
<tr>
<td>10.</td>
<td>Once the email has been entered successfully Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>11.</td>
<td>Follow the remaining steps required to complete any applicable PO Change Order processing. The PO is saved after all changes are made.</td>
</tr>
</tbody>
</table>

Click the **Save** button.
### Step 12

**Action:** Purchase Orders are dispatched every 30 min. An email will be generated with the attached PO when the email option is selected.

Below is an example of the email received.

**Subject Heading line of the email:**
Dispatched Purchase Order

**Body of email:**
Purchase Order, 10000 / 2000000947, has been Dispatched. Please detach and print the attached Purchase Order in PDF format.

**Links that can be used to open inquiry pages in BFS:**
- Click on the link below to enter an acknowledgment for this PO online:

- Click on the link below to view recently dispatched purchase orders:
  - [https://bfs-qa.is.berkeley.edu/psp/bfsqa90/SUPPLIER/ERP/?cmd=login](https://bfs-qa.is.berkeley.edu/psp/bfsqa90/SUPPLIER/ERP/?cmd=login)

### Step 13

**Action:** This completes the exercise

End of Procedure.

---

**Create PO Change Orders**

The pages in BFS used to create PO Change Orders have not been customized. There are numerous areas accessible that do not require data entry. It is important to follow the training developed to prevent needless data entry or errors.

The following BFS page shots and descriptions give an overview of the PO Change Order pages.

The **Purchase Order main page** is divided into three sections that are explained in detail.

1. **Section above the Header**
2. **Header**
3. **Lines**
PO Status:
Purchase order should be in "Dispatched" or "Pending Approval" status before a change order is prepared.

Change Order:
Should always be selected at the start of the change order process. Creates a revision sequence number, opens fields on the PO, and tracks changes made.

Finalize document icon:
Should always be selected immediately after the change order icon. Finalizes all referenced requisitions for the PO and prevents a new pre-encumbrance or PO from being created.

Cancel PO:
Cancels the purchase order if not vouchers exist; no further action (including payments to the vendor) can be taken.
Header section

Dispatch Method
First, determine whether the PO change needs to be sent to the vendor.

- **email**—select to send PO information to the vendor (if your vendor does not accept email, see “Print or Email PO Change Order” UPK for additional instructions).
- **print**—select when you do NOT want to send PO information to the vendor.
- **fax**—do not use for PO Change Order
- **Do not use fax, edx or phone options for change orders**

Add Comment

- Comments should be added at the Header level.
- Format: date/name/action and reason
- Although comments may be added at the Schedule line, best practice is to add comments at the PO Header to centralize all comments related to a purchase order and any subsequent changes.

Lines section

- **Details tab**—used to make changes to the PO Quantity or Price.
- **Schedule icon**—used to navigate to additional change order options.
Schedules section - navigated to via the Schedule Icon on Details tab
Schedule section displays multiple icons that are used to navigate to other areas to prepare changes:

- **Distribution/Chartfield** – change chartstring information.
- **Sched Sales/Use Tax** – change tax.
- **Miscellaneous Charges** – Not used.
- **Value Adjustment** – Not used.

Change PO Amount without Vouchers

The following topic illustrates how a PO Change Order is created to change the **amount** when preexisting vouchers do not exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

**Note:** When vouchers do not exist for a PO the change order process followed to increase or decrease the lines for a PO are the same.
Procedure

In this example a PO Change Order is processed where the amount is decreased for the PO.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>
### Step 2
Click the **Purchase Orders** link.

![Image of Purchase Orders](image_url)

### Step 3
Click the **Add/Update POs** link.

![Image of Add/Update POs](image_url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;2000001247&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
6. The **Purchase Order** page is displayed. Click the **Collapse (Ctrl+Y) Menu** button.

7. Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

   **Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before change are made eliminates warning messages as changes are made.

   Click the **Change Order** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
The next step immediately following is to select the **Finalize Document** icon.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Click the **Finalize Document** button. |
| 9.   | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
Click the **Yes** button. |
| 10.  | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.  
Click the **Dispatch Method** list. |
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide for detailed instruction.  
**Do not use the following values:**  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<p>| 12.  | Click the <strong>Print</strong> list item. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | To change the PO amount for the purchase order locate the Price column on the Details tab. Highlight the field and type in the new price amount.  
**Note:** The process followed is the same to increase or decrease the amount for the line. In this example the price is decreased.  
Enter the desired information into the Price field. Enter a valid value e.g. "400". |
| 14.  | The Refresh button is used to refresh the page and display the correct format for the new Price and it update the Amount.  
Click the Refresh button. |
<p>| 15.  | The Price and Amount columns now show the updated PO amount for the line. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 16.  | **Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.**  

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.  

Click the **Add Comments** link. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 17.  | **The PO Header Comments** page is displayed. The following format should be followed when entering comments.  

**Date/Name/Action and reason**  

The following example is used  

Enter the desired information into the **free form text** field. Enter a valid value e.g. "1/5/2011 - Kristen Jensen - Decreased Amount from $800 to $400 to reflect new Vendor price". |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

![Image of the Purchase Order page](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  

Click the **Save** button. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 20.  | A warning only message is displayed that warns of a difference between the PO Change order and the original requisition. Click OK to bypass the warning.  

Click the **OK** button. |
### Step 21

**Action**

The second warning relates to a value adjustment page that is not used here at Berkeley. Click OK to bypass the message.

Click the **OK** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>The second warning relates to a value adjustment page that is not used here at Berkeley. Click OK to bypass the message. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

### Step 22

**Action**

The **Workflow** pop up is displayed when the change order is successfully saved.

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the requisition requester

Click the **OK** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>The <strong>Workflow</strong> pop up is displayed when the change order is successfully saved. <strong>Note:</strong> New change orders are routed to the approvers worklist based on the Org Node of the requisition requester Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
23. | Click the **Return to Main Page** link. [Return to Main Page]
24. | The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval.**
25. | This completes the tutorial. **End of Procedure.**

**Change PO Amount with Vouchers**

The following topic illustrates how a PO Change Order is created to change the **amount** when preexisting vouchers do exist for the PO. To determine if vouchers currently exist for a PO, please review the topic "Look Up Existing Vouchers for a PO".

The example illustrated below is used in the topic to show how to reduce the PO Amount when vouchers exist. The PO cannot be reduced lower than the sum of the amount currently vouchered. In this example the **Amount invoiced is $153.23** and the amount **not invoiced is $846.77**.
Procedure

In this example a PO Change Order is processed where the amount is decreased for a PO with existing vouchers.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
</tbody>
</table>
### Step 3
Enter the desired information into the **PO ID:** field. Enter a valid value e.g. "2000001252".

### Step 4
Click the **Search** button.
### Step 5

**Action**

Click the **Collapse (Ctrl+Y) Menu** button.

### Step 6

**Action**

Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.

Click the **Change Order** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Once the Change Order icon has been selected it will disappear from the purchase order page. The next step immediately following is to select the <strong>Finalize Document</strong> icon. This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order. Click the <strong>Finalize Document</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>You are returned to the Purchase Order page. The <strong>Dispatch Method</strong> for the PO should be selected. Click the <strong>Dispatch Method</strong> list.</td>
</tr>
</tbody>
</table>
| 10.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide for detailed instruction.  
**Do not use the following values:**  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
Step 11.

Click the Print list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>To change the PO amount for the purchase order locate the Price column on the <strong>Details</strong> tab. Highlight the field and type in the new price amount. Click in the <strong>Price</strong> field.</td>
</tr>
<tr>
<td>13.</td>
<td>At the beginning of the exercise we looked up the PO Activity to determine if vouchers have been entered for the PO. If vouchers exist the total amount can be only be reduced to the sum of the vouchers entered. In this example the total amount vouchered/invoiced is $153.23 Enter the desired information into the <strong>Price</strong> field. Enter a valid value e.g. &quot;153.23&quot;.</td>
</tr>
<tr>
<td>14.</td>
<td>The calculate button will refresh the page and show the new amount for the PO, including any applicable taxes. Click the <strong>Calculate</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>15.</td>
<td>The amounts for the PO have been updated. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason. Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver. Click the <strong>Add Comments</strong> link.</td>
</tr>
<tr>
<td>16.</td>
<td>The <strong>PO Header Comments</strong> page is displayed. The following format should be followed when entering comments. <strong>Date/Name/Action and reason</strong> The following example is used Enter the desired information into the <strong>Active</strong> field. Enter a valid value e.g. &quot;1/14/2011 Ron Campbell - Changed price from 1,000 to 153.23. Canceled water contract&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 17.  | To check for any spelling errors  
      Click the **Spell Check Comments (Alt+5)** button. |
| 18.  | If no spelling errors are found the following message is displayed.  
      Click the **OK** button. |
Step | Action
--- | ---
19. | Once the comments have been entered in the correct format and detail, the information can be saved.

Click the **OK** button.

**OK**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 20. | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  
**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  
Click the **Save** button. |
| 21. | A warning only message is displayed that warns of a difference between the PO Change order and the original requisition. Click OK to bypass the warning.  
Click the **OK** button. |
| 22. | The second warning relates to a value adjustment page that is not used here at Berkeley. Click OK to bypass the message.  
Click the **OK** button. |
Step | Action
---|---
23. | The **Workflow** pop up is displayed when the change order is successfully saved.

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester

Click the **OK** button.
24. Click the Return to Main Page link.

25. The Purchase Order page is displayed. Note that the PO Change Order has been assigned a Change Order of 1. Indicating that 1 change order has taken place for this PO and the PO Status is now Pending Approval.

26. This completes the exercise

End of Procedure.

**Change PO Quantity without Vouchers**

The following topic illustrates how a PO Change Order is created to change the quantity when preexisting vouchers do not exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

**Note:** When vouchers do not exist for a PO the change order process followed to increase or decrease the quantity lines for a PO are the same.
In this example a PO Change Order is processed where the quantity is decreased for the PO.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
4. | Enter the desired information into the **PO ID** field. Enter a valid value e.g. "2000001245".
5. | Click the **Search** button.

![Image of the User Interface](image-url)
6. Click the **Collapse (Ctrl+Y) Menu** button.

7. Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.

Click the **Change Order** button.
### Step 8

Once the Change Order icon has been selected it will disappear from the purchase order page.

The next step immediately following is to select the **Finalize Document** icon.

This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.

Click the **Finalize Document** button.

### Step 9

A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select **yes**.

Click the **Yes** button.

### Step 10

You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected

Click the **Dispatch Method** list.

### Step 11

The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.

1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.

2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.

**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.

Do no not use the following values:

- **EDX** - not used for PO Change Orders
- **Fax** - not used for PO Change Orders
- **Phone** - not used for PO Change Orders

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
The next step immediately following is to select the **Finalize Document** icon.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Click the **Finalize Document** button. |
| 9.   | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select **yes**.  
Click the **Yes** button. |
| 10.  | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected  
Click the **Dispatch Method** list. |
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
Do no not use the following values:  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

Print
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13. | To change the PO quantity for the purchase order locate the **PO Qty** on the **Details** tab. Highlight the field and type in the new quantity.  
**Note:** The process followed is the same to increase or decrease the quantity for the line as long as vouchers do not exist. In this example the quantity is increased.  
Click in the **PO Qty** field. |
| 14. | In this example the quantity is changed from 1 to 2 for line one of the PO. Note that the amount is **$129.00** for the line and **$283.16** for the PO Total amount before the quantity is changed.  
Enter the desired information into the **PO Qty** field. Enter a valid value e.g. "2". |
| 15. | The Refresh button is used to refresh the page and display the correct format for the new quantity and it update the amount.  
Click the **Refresh** button. |
| 16. | The quantity is now changed in this example to 2. The line amount shows the increase to **$258.00**. The PO Total Amount has increased to **$412.16** |
17. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the Add Comments link.

18. The PO Header Comments page is displayed. The following format should be followed when entering comments.

**Date/Name/Action and reason**

The following example is used

Enter the desired information into the Active field. Enter a valid value e.g. "1/7/2011 - Ron Campbell - Changed line 1 from Qty 1 to Qty 2 based on request from Principal Investigator".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>The <strong>Spell Check</strong> functionality is used to check text entered into the free form text area. Click the <strong>Spell Check Comments (Alt+5)</strong> button.</td>
</tr>
<tr>
<td>20.</td>
<td>In this example the word investigator was typed incorrectly. If you agree with the suggested correction, Click the <strong>Change</strong> button.</td>
</tr>
<tr>
<td>21.</td>
<td>Spell check is complete message is received. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>22.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 23.  | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  
**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  
Click the **Save** button. |
<p>| 24.  | The <strong>Purchase Order</strong> page is displayed. Note that the PO Change Order has been assigned a <strong>Change Order of 1</strong>. Indicating that 1 change order has taken place for this PO and the PO Status is now <strong>Pending Approval</strong>. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25.</td>
<td>The <strong>Workflow</strong> pop up is displayed when the change order is successfully saved.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>This completes the exercise</td>
</tr>
<tr>
<td></td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

### Change PO Quantity with Vouchers

The following topic illustrates how a PO Change Order is created to change the **quantity** when preexisting vouchers do exist for the PO. To determine if vouchers currently exist for a PO, please review the topic "Look Up Existing Vouchers for a PO".

The example illustrated below is used in the topic to show how to reduce the PO Quantity when vouchers exist. The PO cannot be reduced lower than the sum of the quantity currently vouched. In this example the **quantity invoiced** is 4 and the amount **not invoiced** is 1.

![Image of Activity Summary](image)

**Procedure**

In this example a PO Change Order is processed where the **quantity is decreased** for the PO.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of software interface with purchasing link highlighted]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Purchase Orders</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td></td>
<td>Add/Update POs</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;2000001256&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
6. Click the **Collapse (Ctrl+Y) Menu** button.

7. Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

   **Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.

   Click the **Change Order** button.
### Step 8

Once the Change Order icon has been selected it will disappear from the purchase order page.

The next step immediately following is to select the **Finalize Document** icon.

This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.

Click the **Finalize Document** button.

### Step 9

A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.

Click the **Yes** button.

### Step 10

You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.

Click the **Dispatch Method** list.

### Step 11

The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.

1) If the vendor **does not require** PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.

2) If the vendor **does require** that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.

**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide for detailed instruction.

Do **not** use the following values:

**EDX** - not used for PO Change Orders

**Fax** - not used for PO Change Orders

**Phone** - not used for PO Change Orders
12. Click the **Print** list item.
To change the PO quantity for the purchase order, locate the **PO Qty** on the **Details** tab. Highlight the field and type in the new quantity.

**Note:** At the beginning of the exercise we did an inquiry on the PO activity for the Purchase Order. The quantity of a PO cannot be reduced lower than the sum of the quantity vouchered. The quantity can be increased without limitations.

Click in the **PO Qty** field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Click in the <strong>PO Qty</strong> field.</td>
</tr>
</tbody>
</table>

![Image of a computer screen showing a software interface with a highlighted field labeled 'PO Qty'].

5.0000
15. In this example the quantity is changed from 5 to 4 for the line. Note that the amount for the line is **$645.00** and Total Amount for the PO is **$707.89** before the quantity is changed.

Enter the desired information into the **PO Qty** field. Enter a valid value e.g. "4".

16. Click the Calculate button to refresh the page and show the new Total Amount with any applicable taxes.

Click the **Calculate** button.

17. The quantity is now changed in this example to 4. The amount for the line reflects the decrease in amount to **$516.00**. The Total Amount for the Purchase Order has also been reduced to **$566.31** including Taxes.

18. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the **Add Comments** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | The **PO Header Comments** page is displayed. The following format should be followed when entering comments. **Date/Name/Action and reason**  

The following example is used  
Enter the desired information into the **Active** field. Enter a valid value e.g. "1/14/2011 Ron Campbell - Changed quantity from 5 to 4. One of the items was on backorder so purchased from another vendor.". |
| 20.  | The **Spell Check** functionality is used to check text entered into the free form text area.  

Click the **Spell Check Comments (Alt+5)** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 21.  | if no errors are found the No misspellings pop up is generated.  
Click the **OK** button. |

OK
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 23.  | The Purchase Order page is displayed. Note that once comments have been entered the hyperlink now reads Edit Comments.  
**Note:** If you are not ready for the PO Change Order to be routed for approval the Hold From Further Processing check box can be used to prevent routing. It must be selected before the change order is saved.  
Click the **Save** button. |
| 24.  | The Purchase Order page is displayed. Note that the PO Change Order has been assigned a Change Order of 1. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**. |
Step | Action
--- | ---
25. | **The Workflow** pop up is displayed when the change order is successfully saved.
   
   **Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester.
   
   Click the **OK** button.

26. | This completes the tutorial
   
   **End of Procedure.**

### Change PO Chartstring/Distribution without Vouchers

The following topic illustrates how a PO Change Order is created to change the chartstring when preexisting vouchers do not exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

**Note:** If vouchers do exist for the PO the chartfields for the PO are grayed and cannot be changed. Follow the "Change Chartstring with Vouchers" topic for resolution.
Procedure

In this example a PO Change Order is processed where the **chartstring** is changed for the PO.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;2000001249&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.  

**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.  

Click the **Change Order** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Once the Change Order icon has been selected it will disappear from the purchase order page. The next step immediately following is to select the <strong>Finalize Document</strong> icon. This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order. Click the <strong>Finalize Document</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>You are returned to the Purchase Order page. The <strong>Dispatch Method</strong> for the PO should be selected. Click the <strong>Dispatch Method</strong> list.</td>
</tr>
</tbody>
</table>
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor **does not require** PO information to be sent, then select:  
**Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor **does require** that PO information is sent, then select:  
**Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction. Do not use the following values:  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

![Image of a webpage with a table and a screenshot of a computer screen.]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>The <strong>Schedule</strong> Icon is used to navigate to schedule page for the line where additional change order options are available.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Schedule</strong> button.</td>
</tr>
</tbody>
</table>
The Schedules page for the line is displayed. The Distribution/Chartfield icon is selected to navigate to the chartfield tab to change the chartstring information for the line.

Click the Distributions/ChartFields button.

The Distribution for Schedule 1 is displayed. In this example Schedule 1 line 1 will be changed.

Note: The Chartfields are open and can be changed. If vouchers existed for the PO the fields would be grayed and unavailable for entry. Follow the Change Chartstring/Distribution with Vouchers tutorial to resolve how changes are made.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>In this example the Dept is changed from 24420 to 23803 for the line. Enter the desired information into the <strong>Dept</strong> field. Enter a valid value e.g. &quot;23803&quot;.</td>
</tr>
<tr>
<td>17.</td>
<td>The Department has been changed. Once all necessary chartfield information has been changed Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
18. Navigate back to the PO Home page to enter comments related to the change made a on the PO header.

Click the Return to Main Page link.

Return to Main Page
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason. Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver. Click the <strong>Add Comments</strong> link.</td>
</tr>
</tbody>
</table>

![Image of a computer screen showing a Purchase Order form, with the Add Comments link highlighted.]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 20. | The **PO Header Comments** page is displayed. The following format should be followed when entering comments. **Date/Name/Action and reason**  
The following example is used  
Enter the desired information into the **Active** field. Enter a valid value e.g. *"incorrect dept was accidently used."*. |
| 21. | To check for any spelling errors  
Click the **Spell Check Comments (Alt+5)** button. |
| 22. | In this example spell check does not recognize part of the name entered. In this example the recommendation is ignored.  
Click the **Ignore** button. |
| 23. | In this example a word is found in error. If the recommendation is correct then it should be changed.  
Click the **Change** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>If no additional errors are found click OK.  &lt;br&gt;Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>25.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved.  &lt;br&gt;Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Note that once comments have been entered the hyperlink now reads <strong>Edit Comments</strong>.  &lt;br&gt;<strong>Note</strong>: If you are not ready for the PO Change Order to be routed for approval the <strong>Hold From Further Processing</strong> check box can be used to prevent routing. It must be selected before the change order is saved.  &lt;br&gt;Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
27. The **Workflow** pop up is displayed when the change order is successfully saved.  

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester  
Click the **OK** button.

28. The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**.

29. This completes the exercise

**End of Procedure.**
Change PO Chartstring/Distribution with Vouchers

The following topic illustrates how a PO Change Order is created to make changes to the chartstring when preexisting vouchers exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

The following process flow outlines the steps followed by the Department and Disbursements. Please review each step and the roles responsible for each. The UPK topic will cover steps 3 and 8. Refer to the steps outlined in the process flow to complete all of the steps successfully.

In the Worklist example below, the item highlighted in the worklist is used in the topic to demonstrate step 2 of the process flow noted above. Other steps are highlighted in the topic as we move through the steps required to resolve changes to the PO when vouchers exist.
Procedure

In this example a PO Change Order is processed where the chartstring is changed for the PO with vouchers.
1. **Step 2** - Per the process flow the voucher in question requires a Chartfield string correction. It should not be approved or denied via the worklist by the Voucher Approver.

**Step 3** - of the Process flow is to prepare a change order to add a new line to the PO with the correct information.

**Note:** When the voucher has not been approved, the new line replaces the existing line. If the voucher has been approved, a new line for the balance of the PO will affect future vouchers only.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of a computer interface with a Purchasing link highlighted.](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>5.</td>
<td>Enter the desired information into the <strong>PO ID</strong>: field. Enter a valid value e.g. &quot;2000001255&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | **Errors received from invalid chartfields.**  
   If a chartfield, such as Fund, has been inactivated between the time the requisition was created and when a PO Change Order is needed the chartfield will be invalid and the department will not be able to process the change order. Contact your Buyer to force close the line with the invalid chartfield. |
| 8.   | **Before you begin the change order process, the Change Order Icon should be selected.** The Change Order Icon when selected will open fields within the change order and track the changes made.  
   Click the **Change Order** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 9.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
The next step immediately following is to select the **Finalize Document** icon.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Click the **Finalize Document** button. |
| 10.  | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
Click the **Yes** button. |
| 11.  | Click the **Dispatch Method** list.  
| 12.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor **does not require** PO information to be sent, then select:  
**Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor **does require** that PO information is sent, then select:  
**Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic: "**Print or Email PO Change Order**" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
**Do not use the following values:**  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

**Print**
## Step 14

**Step 3** - The existing row is in error and has vouchers related to it. A new row is added to replace the existing row for future vouchers. The information from the existing row is copied to the new row with corrections made as needed.

**Note:** If the voucher has not been approved then the new line will replace the original line. If the voucher has been approved then the new line will be used for the balance of the PO and apply to new vouchers.

Click the **Add multiple new rows at row 1 (Alt+7)** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**OK**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 16.  | Highlight the Description field for the item on the row to be copied.  
      Right-click the description field object. |
| 17.  | The description and following fields for the line can be copied from the original line or typed in each field. In the following example the copy paste method is used.  
      Click the Copy menu.  
      or  
      Press [C]. |
Step | Action
--- | ---
18. | In the newly added row
Right-click in the **Description** field.
Step 19. Click the **Paste** menu.
To paste in the description of the item into the field

*or*

Press **[P]**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Continue to copy the information from the line in error to the new line. Enter the desired information into the <strong>PO Qty</strong> field. Enter a valid value e.g. “1”.</td>
</tr>
<tr>
<td>22.</td>
<td>Enter the desired information into the <strong>UOM</strong> field. Enter a valid value e.g. “ea”.</td>
</tr>
<tr>
<td>24.</td>
<td>Right-click in the <strong>Category</strong> field.</td>
</tr>
<tr>
<td>25.</td>
<td>Right-click in the <strong>Category</strong> field.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
26. | **Click the Paste menu.**
  | ![Paste](image)
  | **or**
  | **Press [P].**
Step | Action
--- | ---
27. | Press [Tab].
28. | Enter the desired information into the **Price** field. Enter a valid value e.g. "920".
29. | The chartfield information must also be copied to the new line and any changes made to correct the line are completed. Click the **Schedule** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.</td>
<td>Click the <strong>Distributions/ChartFields</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>31.</td>
<td>Enter the desired information into the <strong>Fund</strong> field. Enter a valid value e.g. &quot;91837&quot;.</td>
</tr>
<tr>
<td>32.</td>
<td>In this example the new Department entered is 12150. Enter the desired information into the <strong>Dept</strong> field. Enter a valid value e.g. &quot;12150&quot;.</td>
</tr>
<tr>
<td>33.</td>
<td>Press [Tab].</td>
</tr>
<tr>
<td>34.</td>
<td>Enter the desired information into the <strong>Program</strong> field. Enter a valid value e.g. &quot;44&quot;.</td>
</tr>
<tr>
<td>35.</td>
<td>Press [Tab].</td>
</tr>
<tr>
<td>36.</td>
<td>Click in the <strong>ChartField 2</strong> field.</td>
</tr>
<tr>
<td>37.</td>
<td>Enter the desired information into the <strong>ChartField 2</strong> field. Enter a valid value e.g. &quot;IMQZ2&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>38.</td>
<td>Once the chartfield information for the row has been updated. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

Click the **OK** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.</td>
<td>The <strong>Schedule</strong> page is displayed. Click the <strong>Return to Main Page</strong> link.</td>
</tr>
</tbody>
</table>

Click the **Return to Main Page** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>40.</td>
<td>Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason. Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver. Click the Add Comments link.</td>
</tr>
</tbody>
</table>

*Add Comment*
Step | Action
--- | ---
41. | The **PO Header Comments** page is displayed. The following format should be followed when entering comments.

**Date/Name/Action and reason**

The following example is used
Enter the desired information into the **Active** field. Enter a valid value e.g. 
"Ron Campbell - Changed Dept from 12160 to 12150. Incorrect dept was selected in error".

42. | To check for any spelling errors
Click the **Spell Check Comments (Alt+5)** button.

![Image of PO Header Comments page](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 43.  | If no spelling errors are found the following message is displayed.  
     | Click the **OK** button. |

![Image of a computer screen showing a window with a warning message and an OK button.](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 44.  | Once the comments have been entered in the correct format and detail, the information can be saved.  

Click the **OK** button.  

**OK**
Step | Action
--- | ---
45. | **The Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.

**Note:** The checkbox can be selected and saved when the change order is in a status of pending approval to remove it from the worklist for further editing if desired.

Be sure to always uncheck the Hold From Further Processing check box and save when you are ready to initiate workflow and route the change order to the Approvers worklist.

Click the **Save** button.
46. The **Workflow** pop up is displayed when the change order is successfully saved.

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester

Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>47.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Note that the PO Change Order has been assigned a <strong>Change Order of 1</strong>. Indicating that 1 change order has taken place for this PO and the PO Status is now <strong>Pending Approval</strong>.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>48.</td>
<td><strong>Step - 3:</strong> Of the Process Flow Is complete.</td>
</tr>
</tbody>
</table>

**Step - 4:** The **PO Changer Order Approver** must approve the change order before corrections to the voucher can be made.

**Step - 4-5:** Depending on your department's business processes the **PO Change Order Approver** or **Preparer** notifies the **Voucher Approver** that they can proceed with step 5.

**Steps 5-7:** The **Voucher Approver** works with **Disbursements** to correct and approve the voucher.

**Step 7- 8:** Depending on your department's business processes the **Voucher Approver** notifies the **PO Change Order Preparer** that they can proceed with step 8.

**Step - 8:** Of the Process Flow is covered in the remainder of this lesson.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 49.  | **Step 8.** The PO Change Order Preparer processes another change order for the PO to cancel or reduce the line in error. Navigate to the applicable purchase order.  
Click the *Purchasing* link. |

![Image of a computer screen with the Purchasing link highlighted.](image-url)
### Step 50
Click the **Purchase Orders** link.

| Purchase Orders |

### Step 51
Click the **Add/Update POs** link.

<p>| Add/Update POs |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;20000012990&quot;.</td>
</tr>
<tr>
<td>53.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
### Step | Action
---|---
54. | The **Purchase Order** page is displayed. Click the **Collapse (Ctrl+Y) Menu** button.
55. | Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made. Click the **Change Order** button.
56. | Once the Change Order icon has been selected it will disappear from the purchase order page. The next step immediately following is to select the **Finalize Document** icon. This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order. Click the **Finalize Document** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 57.  | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
Click the **Yes** button. |
| 58.  | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.  
Click the **Dispatch Method** list. |
| 59.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor does **not require** PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor does **require** that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
*Note:* If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
*Do not use the following values:*  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
Step 60. Click the **Print** list item.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>60.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>61.</td>
<td>To access the functionality that allows the cancelation of a line you will need to navigate to the Statuses tab. Click the <strong>Statuses</strong> tab.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 62.  | The **Statuses** tab is displayed. **Line 1** is the line that is in error in this scenario and needs to be canceled. Disbursements has pointed the existing vouchers to the new (line 2) added to the PO in step 3 of the Process Flow.  

**Note:** Disbursements cannot make changes to vouchers that have been approved. For lines not marked Amount Only and that have been vouchered for the full quantity, BFS will cancel the lien 30 days from the last activity date. For lines marked Amount Only, departments should reduce the amount of the PO line to the sum of existing vouchers.  

Refer to Topic "**Change PO Amount with Vouchers**" for guided steps on how to reduce the amount of a PO line with vouchers.  

Click the **Cancel Line** button. |
| 63.  | We do not want the open the requisition quantity to be resourced again. **Always select** **No** to bypass this warning.  

Click the **No** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>64.</td>
<td>A warning is received that the action taken will cancel the line for the PO. Select <strong>Yes</strong> to bypass the warning message. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>65.</td>
<td>The status for the line is now <strong>Canceled</strong>. The next step is to add comments for the change order. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason. Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver. Click the <strong>Edit Comments</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 66.  | The **PO Header Comments** page is displayed. The comments added during Step 3 of the business process is visible. To add comments related to this change order select the add a new row button.  
Click the **Add a new row at row 1 (Alt+7)** button. |
| 67.  | Enter the desired information into the **Active** field. Enter a valid value e.g. "1/14/2011 - Ron Campbell - Changed Dept from 12130 to 12150. Incorrect dept was used". |
| 68.  | To check for any spelling errors  
Click the **Spell Check Comments (Alt+5)** button. |
| 69.  | In this example spell check does not recognize a common word "chartstring". You can click Ignore to bypass the warning or add to add the word to the spell check dictionary. in this example the warning is ignored.  
Click the **Ignore** button. |
| 70.  | If no additional errors are found click OK.  
Click the **OK** button. |
| 71.  | The **PO Header Comments** page is again displayed. Note that there are now 2 rows of comments available for viewing related to the change order. All of the comments can be viewed at one time.  
Click the **View All** link. |
Step | Action
--- | ---
72. | All comment rows are displayed. The format followed for date/name/action and reason makes it easy for the PO Change Order Approver to quickly identify what changes were made for the PO. Note that the oldest comment is listed first. To save your comments and return to the main page.

Click the **OK** button.

![Image of a software interface displaying PO header comments with a button labeled 'OK']
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 73.  | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  
**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  
**Note:** The checkbox can be selected and saved when the change order is in a status of pending approval to remove it from the worklist for further editing if desired.  
Be sure to always uncheck the Hold From Further Processing check box and save when you are ready to initiate workflow and route the change order to the Approvers worklist.  
Click the **Save** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>74.</td>
<td>The <strong>Workflow</strong> pop up is displayed when the change order is successfully saved. <strong>Note:</strong> New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>75.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Note that the PO Change Order has been assigned a <strong>Change Order of 2</strong>. Indicating that 2 change orders have taken place for this PO and the PO Status is now <strong>Pending Approval</strong>.</td>
</tr>
</tbody>
</table>
### Step Action

76. **Step - 3:** Is complete.

   **Step - 4:** Is complete

   **Step - 4-5:** Is complete

   **Steps 5-7:** Is complete

   **Step 7-8:** Is complete

   **Step - 8:** Is complete

   **Step - 9:** The **PO Change Order Approver** proceeds to Step 9 to complete the process.

77. **This completes the exercise**

   **End of Procedure.**
Change PO Lines to Amount Only without Vouchers

The following topic illustrates how a PO Change Order is created to change a line(s) to **Amount Only** when preexisting vouchers do not exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

Procedure

In this example a PO Change Order is processed where the line is changed to Amount Only for the PO.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of Purchasing link]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
</tbody>
</table>

[View Purchase Orders](#)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the scrollbar.</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID</strong>: field. Enter a valid value e.g. &quot;2000001248&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.  

**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.  

Click the **Change Order** button.  |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
      | The next step immediately following is to select the **Finalize Document** icon.  
      | This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
      | Click the **Finalize Document** button. |
| 9.   | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
      | Click the **Yes** button. |
| 10.  | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.  
      | Click the **Dispatch Method** list. |
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
      | 1) If the vendor does not require PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
      | 2) If the vendor does require that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
      | **Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
      | Do not use the following values:  
      | **EDX** - not used for PO Change Orders  
      | **Fax** - not used for PO Change Orders  
<pre><code>  | **Phone** - not used for PO Change Orders |
</code></pre>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

![Image of a software interface showing a Purchase Order with options to print.]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | Change the PO line to Amount only.  
In this example he Attributes tab is selected. The Customize page link could be used to move the Amount Only flag to the Details tab. 
Click the **Attributes** tab. |
| 14.  | The **Attributes** tab is displayed. If vouchers exist for the PO an error message is generated if the check box for Amount Only is selected. You must un select the check box before you can exit the page. Refer to the **Change PO Lines to Amount Only with Vouchers** tutorial to understand how to resolve the scenario. 
In this example vouchers do not exist for the PO  
Click the **Amount Only** option. |
| 15.  | A warning message is displayed related to the Amount Only change. Click OK to bypass the message.  
Click the **Yes** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason. Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver. Click the <strong>Add Comments</strong> link.</td>
</tr>
<tr>
<td>17.</td>
<td>The <strong>PO Header Comments</strong> page is displayed. The following format should be followed when entering comments. <strong>Date/Name/Action and reason</strong> The following example is used  Enter the desired information into the <strong>Active</strong> field. Enter a valid value e.g. &quot;1/6/2011 - Kristen Jensen - PO Should have been set up as Amount Only&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 18.  | To check for possible spelling errors
      | Click the **Spell Check Comments (Alt+5)** button. |
| 19.  | In this example the system does not recognize a name. Click ignore to bypass the recommendation.
      | Click the **Ignore** button. |
| 20.  | Click the **OK** button. |
| 21.  | Once the comments have been entered in the correct format and detail, the information can be saved.
      | Click the **OK** button. |

![Image of the Enterprise Systems Solutions User Support interface](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 22.  | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  
**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  
Click the **Save** button. |
| 23.  | The **Workflow** pop up is displayed when the change order is successfully saved.  
**Note:** New change orders are routed to the approvers worklist based on the Org Node of the requisition requester  
Click the **OK** button. |
| 24.  | This completes the exercise  
**End of Procedure** |
Change PO lines to Amount Only with Vouchers

The following topic illustrates how a PO Change Order is created to designate the PO as **Amount Only** when preexisting vouchers exist for the PO. To determine if vouchers currently exist for a PO please review topic "Look Up Existing Vouchers for a PO".

The following process flow outlines the steps followed by the Department and Disbursements. Please review each step and the roles responsible for each. The topic will cover steps 3 and 8. Refer to the steps outlined in the process flow to complete all of the steps successfully.

As an example, the item highlighted in the worklist is used in the topic to demonstrate **step 2** of the process flow noted above. Other steps are highlighted in the topic as we move through the steps required to resolve changes to the PO when vouchers exist.
Procedure

In this example a PO Change Order is processed where the PO is **changed to amount only and vouchers exist**.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Step 2</strong> - Per the process flow outlined in the concept area of the topic, the voucher in question requires a correction for Amount Only. It <strong>should not</strong> be approved or denied via the worklist by the Voucher Approver.</td>
</tr>
<tr>
<td></td>
<td><strong>Step 3</strong> - of the Process flow is to prepare a change order to add a new line to the PO with the correct information.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: When the voucher has not been approved, the new line replaces the existing line. If the voucher has been approved, a new line for the balance of the PO will affect future vouchers only.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of Purchasing link in web browser interface]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
</tbody>
</table>

![Image of a computer screen with a window open to a software interface showing a form with various fields and options, indicating the action to be taken.](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID</strong> field. Enter a valid value e.g. &quot;2000001254&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
### Step 6
Click the **Collapse (Ctrl+Y) Menu** button.

### Step 7
Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

Click the **Change Order** button.

### Step 8
Once the Change Order icon has been selected it will disappear from the purchase order page.

The next step immediately following is to select the **Finalize Document** icon.

This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.

Click the **Finalize Document** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Dispatch Method</strong> list.</td>
</tr>
</tbody>
</table>
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
   1) If the vendor **does not require** PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
   2) If the vendor **does require** that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
   **Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
   Do no not use the following values:  
   **EDX** - not used for PO Change Orders  
   **Fax** - not used for PO Change Orders  
   **Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

**Click the Print list item.**
Step 13. **Step 3** - The existing row is in error and has vouchers related to it. A new row is added to replace the existing row for future vouchers. The information from the existing row is copied to the new row with corrections made as needed including marking the line as Amount Only.

**Note:** If the voucher has not been approved then the new line will replace the original line. If the voucher has been approved then the new line will be used for the balance of the PO and apply to new vouchers.

Click the **Add multiple new rows at row 1 (Alt+7)** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Copy the description from the row in error into the description field for the new row. Click in the field.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Description Field" /></td>
</tr>
<tr>
<td>16.</td>
<td>Continue to copy the data into the remaining fields. Enter the desired information into the <strong>PO Qty</strong> field. Enter a valid value e.g. &quot;1&quot;.</td>
</tr>
<tr>
<td>17.</td>
<td>Enter the desired information into the <strong>UOM</strong> field. Enter a valid value e.g. &quot;ea&quot;.</td>
</tr>
<tr>
<td>18.</td>
<td>Enter the desired information into the <strong>Category</strong> field. Enter a valid value e.g. &quot;41200000&quot;.</td>
</tr>
<tr>
<td>19.</td>
<td>Enter the desired information into the <strong>Price</strong> field. Enter a valid value e.g. &quot;256.26&quot;.</td>
</tr>
<tr>
<td>20.</td>
<td>The chartfield information must also be copied to the new line and any changes made to correct the line. Click the <strong>Schedule</strong> button.</td>
</tr>
</tbody>
</table>
Step 21.

Click the **Distributions/ChartFields** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Copy the chartfield information into the line from the existing row in error. Enter the desired information into the <strong>Fund</strong> field. Enter a valid value e.g. &quot;94762&quot;.</td>
</tr>
<tr>
<td>23.</td>
<td>Enter the desired information into the <strong>Dept</strong> field. Enter a valid value e.g. &quot;31150&quot;.</td>
</tr>
<tr>
<td>24.</td>
<td>Enter the desired information into the <strong>Program</strong> field. Enter a valid value e.g. &quot;44&quot;.</td>
</tr>
<tr>
<td>25.</td>
<td>Enter the desired information into the <strong>ChartField 2</strong> field. Enter a valid value e.g. &quot;RRDAS&quot;.</td>
</tr>
<tr>
<td>26.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>27.</td>
<td>The <strong>Schedules</strong> page is displayed. Click the <strong>Return to Main Page</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>28.</td>
<td>To designate the new row as Amount only</td>
</tr>
<tr>
<td></td>
<td>Click the Attributes tab.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the Amount Only option.</td>
</tr>
<tr>
<td>30.</td>
<td>A warning message is received related to the change to Amount Only for the PO line. The warning is to let you know that an Amount Only line can only be for a quantity of 1. Quantities greater than 1 are adjusted to 1 by the system. You will need to adjust the price accordingly for the Blanket Order.</td>
</tr>
<tr>
<td></td>
<td>Select yes to bypass the warning message and accept the changes. Click the Yes button.</td>
</tr>
</tbody>
</table>
31. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the **Add Comments** link.

32. The **PO Header Comments** page is displayed. The following format should be followed when entering comments.

**Date/Name/Action and reason**

The following example is used:

Enter the desired information into the **Active** field. Enter a valid value e.g. "1/14/2011 Ron Campbell - Marked line 2 as Amount Only to replace line 1".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 33.  | To check for any spelling errors  
Click the **Spell Check Comments (Alt+5)** button. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 34.  | If no spelling errors are found the following message is displayed.  
Click the **OK** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 35.  | Once the comments have been entered in the correct format and detail, the information can be saved.  

Click the **OK** button.  

![Image](image_url)
Step | Action
---|---
36. | The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.

**Note:** The checkbox can be selected and saved when the change order is in a status of pending approval to remove it from the worklist for further editing if desired.

Be sure to always uncheck the Hold From Further Processing check box and save when you are ready to initiate workflow and route the change order to the Approvers worklist.

Click the **Save** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 37.  | The **Workflow** pop up is displayed when the change order is successfully saved.  
**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester  
Click the **OK** button. |

![Workflow pop up display](image-url)
Step | Action
---|---
38. | The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**.
Step 39. **Action**

**Step - 3:** Of the Process Flow is complete.

**Step - 4:** The PO Changer Order Approver must approve the change order before corrections to the voucher can be made.

**Step - 4-5:** Depending on your department's business processes the PO Change Order Approver or Preparer notifies the Voucher Approver that they can proceed with step 5.

**Steps 5-7:** The Voucher Approver works with Disbursements to correct and approve the voucher.

**Step 7-8:** Depending on your department's business processes the Voucher Approver notifies the PO Change Order Preparer that they can proceed with step 8.

**Step - 8:** Of the Process Flow is covered in the remainder of this lesson.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 40.  | **Step 8.** The **PO Change Order Preparer** processes another change order for the PO to cancel or reduce the line in error. Navigate to the applicable purchase order.  

Click the **Purchasing** link. |

![](image)

**Purchasing** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>41.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>43.</td>
<td>Enter the desired information into the <strong>PO ID</strong> field. Enter a valid value e.g. &quot;2000001291&quot;.</td>
</tr>
<tr>
<td>44.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>45.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
<tr>
<td>46.</td>
<td>Before you begin the change order process, the <strong>Change Order Icon</strong> should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made. Click the <strong>Change Order</strong> button.</td>
</tr>
<tr>
<td>47.</td>
<td>Once the Change Order icon has been selected it will disappear from the purchase order page. The next step immediately following is to select the <strong>Finalize Document</strong> icon. This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order. Click the <strong>Finalize Document</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 48.  | A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes.  
Click the **Yes** button. |
| 49.  | You are returned to the Purchase Order page. The **Dispatch Method** for the PO should be selected.  
Click the **Dispatch Method** list. |
| 50.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor **does not require** PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor **does require** that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "**Print or Email PO Change Order**" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
**Do not use the following values:**  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>51.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

**Print**
Step | Action
--- | ---
52. | To access the functionality that allows the cancelation of a line you will need to navigate to the Statuses tab.

Click the **Statuses** tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 53.  | The **Statuses** tab is displayed. **Line 1** is the line that is in error in this scenario and needs to be canceled. Disbursements has pointed the existing vouchers to the new (line 2) added to the PO in step 3 of the Process Flow.  
**Note:** Disbursements cannot make changes to vouchers that have been approved. For lines not marked Amount Only and that have been vouchered for the full quantity, BFS will cancel the lien 30 days from the last activity date. For lines marked Amount Only, departments should reduce the amount of the PO line to the sum of existing vouchers.  
Refer to Topic "**Change PO Amount with Vouchers**" for guided steps on how to reduce the amount of a PO line with vouchers. |
|      | Click the **Cancel Line** button. |
| 54.  | We do not want the open the requisition quantity to be resourced again. Always select **No** to bypass this warning. |
|      | Click the **No** button. |
55. A warning is received that the action taken will cancel the line for the PO. Select Yes to bypass the warning message.

Click the Yes button.

56. The status for the line is now "Canceled". The next step is to add comments for the change order.

Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the Edit Comments link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>57.</td>
<td>The <strong>PO Header Comments</strong> page is displayed. The comments added during Step 3 of the business process is visible. To add comments related to this change order select the add a new row button. Click the <strong>Add a new row at row 1 (Alt+7)</strong> button.</td>
</tr>
<tr>
<td>58.</td>
<td>Enter the desired information into the <strong>Active</strong> field. Enter a valid value e.g. &quot;1/31/2011 - Ron Campbell - Line 2 marked as Amount Only replaces line 1. Canceled line 1.&quot;</td>
</tr>
<tr>
<td>59.</td>
<td>To check for any spelling errors Click the <strong>Spell Check Comments (Alt+5)</strong> button.</td>
</tr>
<tr>
<td>60.</td>
<td>In this example no spelling errors were found. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
### Step 61

The **PO Header Comments** page is again displayed. Note that there are now 2 rows of comments available for viewing related to the change order. All of the comments can be viewed at one time.

Click the **View All** link.

### Step 62

All comment rows are displayed. The format followed for date/name/action and reason makes it easy for the PO Change Order Approver to quickly identify what changes were made for the PO. Note that the oldest comment is listed first. To save your comments and return to the main page.

Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 63.  | The **Purchase Order** page is displayed. Click Save to save the change order information.  

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  

**Note:** The checkbox can be selected and saved when the change order is in a status of pending approval to remove it from the worklist for further editing if desired.  

Be sure to always uncheck the Hold From Further Processing check box and save when you are ready to initiate workflow and route the change order to the Approvers worklist.  

Click the **Save** button. |
Step | Action
--- | ---
64. | The **Workflow** pop up is displayed when the change order is successfully saved.

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester
Click the **OK** button.

65. | The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 2**. Indicating that 2 change orders have taken place for this PO and the PO Status is now **Pending Approval**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Step - 4: Is complete</td>
</tr>
<tr>
<td></td>
<td>Step - 4-5: Is complete</td>
</tr>
<tr>
<td></td>
<td>Steps 5-7: Is complete</td>
</tr>
<tr>
<td></td>
<td>Step 7-8: Is complete</td>
</tr>
<tr>
<td></td>
<td>Step - 8: Is complete</td>
</tr>
<tr>
<td></td>
<td><strong>Step - 9:</strong> The <strong>PO Change Order Approver</strong> proceeds to Step 9 to complete the process.</td>
</tr>
<tr>
<td>67.</td>
<td>This completes the exercise <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

**Correct PO Sales/Use Tax**

The following topic illustrates how a PO Change Order is created to change the **tax** for the PO. The process can be followed if vouchers do or do not exist for the PO.

**Procedure**

In this example a PO Change Order is processed where the **tax is changed to exempt an item** for the PO.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>
### Step 2

Click the **Purchase Orders** link.

### Step 3

Click the **Add/Update POs** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID</strong>: field. Enter a valid value e.g. &quot;2000001250&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
6. The **Purchase Order** page is displayed
   Click the **Collapse (Ctrl+Y) Menu** button.

7. Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.

   **Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before changes are made eliminates warning messages as changes are made.

   Click the **Change Order** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | Once the Change Order icon has been selected it will disappear from the purchase order page.  
The next step immediately following is to select the **Finalize Document** icon.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Click the **Finalize Document** button. |
| 9.   | A warning message is displayed that all eligible distributions for the PO will be finalized.  You should always select yes.  
Click the **Yes** button. |
| 10.  | You are returned to the Purchase Order page.  The **Dispatch Method** for the PO should be selected.  
Click the **Dispatch Method** list. |
| 11.  | The value displayed for the **Dispatch Method** on the PO is defaulted from vendor set-up.  The method may need to be changed depending on the need to send PO information to the vendor.  
1) If the vendor **does not require** PO information to be sent, then select: **Print** - the print option for PO Change Orders will not print the PO.  
2) If the vendor **does require** that PO information is sent, then select: **Email** - the email option will send a copy of the official PO to the vendor via email.  The email dispatch method is **NOT** available for **After the Fact** or **Subaward** POs.  
**Note:** If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic - "Print or Email PO Change Order" in the UPK under Purchasing or the Quick Reference Guide" for detailed instruction.  
**Do not use the following values:**  
**EDX** - not used for PO Change Orders  
**Fax** - not used for PO Change Orders  
**Phone** - not used for PO Change Orders |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

Click the **Print** list item.
Step | Action
--- | ---
13. | The **Schedule** icon is used to navigate to schedule page for the line where additional change order options are available.  

Click the **Schedule** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>The <strong>Schedules</strong> page for the line is displayed. The <strong>Schedule/Use Tax</strong> icon is selected to navigate to the Sales Use Tax schedule for the line and to change tax related information. Click the <strong>Sched Sales/Use Tax</strong> button.</td>
</tr>
</tbody>
</table>

![Image of the interface displaying the Schedules page with selected Schedule/Use Tax icon.](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>The Sales/Use Tax Information page is displayed for line 1 of the schedule. Change the taxability for the line. Click the <strong>Tax Applicability</strong> list.</td>
</tr>
</tbody>
</table>
| 16.  | The values displayed are as listed. Refer to your business rules choose from applicable selections that are used at UCB.  
**Direct Pay** - Do not use  
**Item is exempt** - removes taxability  
**Purchaser is Exonerated** - Do Not use  
**Sales Tax Appl** - Applies Sales Tax  
**Use Tax Appl** - Applies Use Tax |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 17.  | In this example the selection is made to exempt the item from taxability.  

Click the **Item is Exempt** list item. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>Current tax in the example is $16.28. The Calculate SUT is selected to confirm the tax has been removed. Click the <strong>Calculate SUT</strong> button.</td>
</tr>
<tr>
<td>19.</td>
<td>The sales tax has been removed for the line. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
20. Click the **Return to Main Page** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 21.  | The tax amount of $16.28 and total PO amount of $183.28 is still displayed. Use the calculate button to reflect the tax exemption change for the PO.  

Click the **Calculate** button. |
| 22.  | Tax has been removed and the new PO Total Amount is **$167.00**.  

Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.  

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.  

Click the **Add Comments** link. |
23. The PO Header Comments page is displayed. The following format should be followed when entering comments. **Date/Name/Action and reason**  
The following example is used: Enter the desired information into the **Active** field. Enter a valid value e.g. "1/7/2011 - Kristen Jensen - Item is not subject to sales/use tax".

24. To check for any spelling errors, click the **Spell Check Comments (Alt+5)** button.

25. In this example spell check does not recognize part of the name entered. In this example the recommendation is ignored. Click the **Ignore** button.

26. If no additional errors are found click OK. Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>27.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved. <strong>Click the OK button.</strong></td>
</tr>
</tbody>
</table>

**Step 28.**  
The **Purchase Order** page is displayed. Note that once comments have been entered the hyperlink now reads *Edit Comments*.  

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  

**Click the Save button.**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 29.  | The **Workflow** pop up is displayed when the change order is successfully saved.  

**Note:** New change orders are routed to the approvers worklist based on the Org Node of the Requisition Requester. Click the **OK** button. |
| 30.  | The **Purchase Order** page is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**. |
| 31.  | This completes the exercise **End of Procedure**. |

---

**Change PO Vendor Address**
The following topic illustrates how a PO Change Order is created to change the address for a Vendor location. The default address for a location is address 1. All of the existing addresses for a location are selectable via the PO Change Order pages. The process can be followed if vouchers do or do not exist for the PO.

Procedure

In this example a PO Change Order is processed to change the address for a Vendor location

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Purchasing link.</td>
</tr>
</tbody>
</table>

![Image of Purchasing link](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image1" alt="Purchase Orders Link" /></td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Add/Update POs Link" /></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the desired information into the <strong>PO ID:</strong> field. Enter a valid value e.g. &quot;2000001251&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | Before you begin the change order process, the **Change Order Icon** should be selected. The Change Order Icon when selected will open fields within the change order and track the changes made.  
**Note:** If the change order icon is not selected the system will notify you later as changes are made that changes are being tracked. Selecting the icon before change sars are made eliminates warning messages as changes are made.  
Click the **Change Order** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Once the Change Order icon has been selected it will disappear from the purchase order page. The next step immediately following is to select the <strong>Finalize Document</strong> icon. This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order. Click the <strong>Finalize Document</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>A warning message is displayed that all eligible distributions for the PO will be finalized. You should always select yes. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>You are returned to the Purchase Order page. The <strong>Dispatch Method</strong> for the PO should be selected Click the <strong>Dispatch Method</strong> list.</td>
</tr>
<tr>
<td>11.</td>
<td>The value displayed for the <strong>Dispatch Method</strong> on the PO is defaulted from vendor set-up. The method may need to be changed depending on the need to send PO information to the vendor. 1) If the vendor does not require PO information to be sent, then select: <strong>Print</strong> - the print option for PO Change Orders will not print the PO. 2) If the vendor does require that PO information is sent, then select: <strong>Email</strong> - the email option will send a copy of the official PO to the vendor via email. The email dispatch method is <strong>NOT</strong> available for <strong>After the Fact</strong> or <strong>Subaward</strong> POs. <strong>Note:</strong> If the vendor does not accept email or an Official PO copy is needed for printing please refer to the Topic: &quot;Print or Email PO Change Order&quot; in the UPK under Purchasing or the Quick Reference Guide&quot; for detailed instruction. Do not use the following values: <strong>EDX</strong> - not used for PO Change Orders <strong>Fax</strong> - not used for PO Change Orders <strong>Phone</strong> - not used for PO Change Orders</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>Print</strong> list item.</td>
</tr>
</tbody>
</table>

**Print**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Access the Vendor Detail page to select a different address location than the current address location assigned.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Vendor Details</strong> link.</td>
</tr>
<tr>
<td>14.</td>
<td>The <strong>Vendor Details</strong> page is displayed. Note that in this example the Location 1 was selected on the requisition. Address 1 for the location is the default and cannot be changed at the requisition level. The details for the address currently selected are displayed under the Vendor Details Message heading.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 15.  | View any additional address locations and the detailed description for each address.  
Click the **Vendor Information** link. |

![Vendor Details for Stanford University](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>A new window is opened and the Vendor Information Address tab is displayed. Note that there are seven Address IDs available for the vendor. Click the View All link to see all address detailed information for each location.</td>
</tr>
</tbody>
</table>

Click the **View All** link.
17. In this example the address that we want to use for the PO is associated with Address ID 5. Once Location has been identified the newly opened window can be closed.

Click the Close button.
18. To change the address ID, click the search icon to view all of the available address numbers for the vendor.

Click the **Look up Address (Alt+5)** button.

19. The Address ID are listed for the Vendor and description. In this example we have previously looked up the detailed vendor address information and select address **5**.

Click the **5** link.

20. Address 5 has been selected. Select the Show Address Details button to refresh the address information listed under the Vendor Details message heading.

Click the **Show Address Details** button.

21. The details for the new address associated with the PO is now displayed.

Click the **OK** button.
22. Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the Add Comments link.
### Step 23

**The PO Header Comments** page is displayed. The following format should be followed when entering comments.

**Date/Name/Action and reason**

The following example is used:

Enter the desired information into the **Active** field. Enter a valid value e.g. "1/7/2011 - Kristen Jensen - Update Remit to Vendor Location to #5 Contracts and Grants Office for this Subaward".

### Step 24

**The Spell Check** functionality is used to check text entered into the free form text area.

Click the **Spell Check Comments (Alt+5)** button.

### Step 25

In this example the system does not recognize part of a name. If the recommendation is incorrect. Select to ignore.

Click the **Ignore** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.</td>
<td>In this example the system does not a word. If the recommendation is incorrect. Select to ignore. The Add button is also available if it is a word commonly used and should be added to the dictionary. In this example Ignore is selected. Click the <strong>Ignore</strong> button.</td>
</tr>
<tr>
<td>27.</td>
<td>Spell check is complete message is received. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>28.</td>
<td>Once the comments have been entered in the correct format and detail, the information can be saved. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>29.</td>
<td></td>
</tr>
</tbody>
</table>

The **Purchase Order page** is displayed. Note that once comments have been entered the hyperlink now reads **Edit Comments**.  

**Note:** If you are not ready for the PO Change Order to be routed for approval the **Hold From Further Processing** check box can be used to prevent routing. It must be selected before the change order is saved.  

Click the **Save** button.  

| 30.  | 

The **Purchase Order page** is displayed. Note that the PO Change Order has been assigned a **Change Order of 1**. Indicating that 1 change order has taken place for this PO and the PO Status is now **Pending Approval**.  

![Image of Purchase Order page](image-url)
### Cancel PO

The following topic illustrates how a PO Change Order is canceled in BFS. A PO cannot be canceled if there are vouchers for the PO. The process to cancel a PO differs in that the Change Order Icon is NOT selected at the beginning of the process. Please follow the steps outlined to successfully cancel a PO.

**Note:** A canceled PO cannot be reopened or any other action taken.

**Procedure**

In this example a PO is **canceled** because the purchased items were on backordered and obtained from another vendor.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of software interface with Purchasing link highlighted]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image1.png" alt="Purchase Orders Link" /></td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td></td>
<td><img src="image2.png" alt="Add/Update POs Link" /></td>
</tr>
</tbody>
</table>
4. Enter the desired information into the **PO ID** field. Enter a valid value e.g. "2000001242".

5. Click the **Search** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Click the <strong>Collapse (Ctrl+Y) Menu</strong> button.</td>
</tr>
</tbody>
</table>
| 7.   | The **Finalize Document** icon is selected.  
This process when ran closes the requisition and eliminates the possibility of the requisition re-sourcing to another Purchase Order.  
Note: When processing a PO cancellation the change order Icon is not selected. This will prevent the cancellation from routing to the approvers worklist.  
Click the **Finalize Document** button. |
| 8.   | A warning message is received that the action will finalize all eligible distributions. Always select yes to bypass this warning message.  
Click the **Yes** button. |
### Step 9

**Action**

Enter Comments - Comments should always be added to the PO Change Order at the header level to explain the changes made and the reason.

Comments can be added at the line level for the Purchase Order but as a matter of practice they should be added at the header. This centralizes all comments to one area for review by the PO Change Order Approver.

Click the **Add Comments** link.

![Add Comments](image)

### Step 10

**Action**

The **PO Header Comments** page is displayed. The following format should be followed when entering comments.

**Date/Name/Action and reason**

The following example is used:

Enter the desired information into the **Active** field. Enter a valid value e.g. "1/7/2011 - Ron Campbell - Goods could not be delivered in a timely fashion so ordered from another vendor".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>To check for any spelling errors. Click the <strong>Spell Check Comments (Alt+5)</strong> button.</td>
</tr>
<tr>
<td>12.</td>
<td>No spelling errors were found. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

13. The next step is to cancel the PO. Select the **Cancel** icon. Once a PO has been canceled, it cannot be reopened or any other action taken.

Note: if vouchers exist for the PO it cannot be canceled.

Click the **Cancel PO** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>A warning message is displayed that emphasizes that changes can not be made to the PO once it has been successfully canceled. Click Yes to bypass the warning. Click the <strong>Yes</strong> button.</td>
</tr>
<tr>
<td>15.</td>
<td>The <strong>Cancel Purchase Order</strong> page is displayed. The default radio button action is to not resource the requisition i.e. do not create a new PO. Accept the default selection and click continues. Click the <strong>Continue</strong> button.</td>
</tr>
</tbody>
</table>
### Step

16. The next step in the process is to run the Budget Check process.

**Click the **Budget Check** button.**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 17.  | When the Budget Check process is complete you are returned to the Find an Existing Value search page. This search page is used to pull retrieve POs for editing, since the PO has been canceled you will need to navigate to the inquiry pages. To review the PO Information for the canceled PO select to Expand the Menu.  

Click the **Expand (Ctrl+Y) Menu** button. |
| 18.  | Click the **Review PO Information** link. |
Step 19.

Click the **Purchase Orders** link.

**Purchase Orders**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Enter the desired information into the <strong>PO ID</strong> field. Enter a valid value e.g. &quot;2000001242&quot;.</td>
</tr>
<tr>
<td>21.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>22.</td>
<td>The <strong>Purchase Order</strong> page is displayed. Note that the PO status is now <strong>Pend Cancelation</strong> and all lines for the PO are in a status of <strong>Canceled</strong>.</td>
</tr>
</tbody>
</table>
23. Comments related to the reason the PO was canceled can be viewed. Click the **Header Comments...** link.

24. Related comments added by the PO Change Order Preparer are displayed.

25. This completes the exercise **End of Procedure.**

### Add a Line to a PO

There may be a need on occasion to add a new line to a Purchaser Order. There is an add button located at the end of each PO line that will enable you to add one or multiple lines.

**Note:** The functionality used to insert additional rows into the purchaser order inserts a new line/row directly below an existing line. The information from the existing PO line is not copied over to the new PO line.

### Add Multiple Lines Button
Procedure

In this example a new **line is added** to a Purchase Order.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of the Purchasing link in a software interface]

**Purchasing**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
</tbody>
</table>

![Image of a software interface with a task labeled 'Add/Update POs']
3. Enter the desired information into the **PO ID** field. Enter a valid value e.g. "2000001227".

4. Click the **Search** button.
Step | Action
--- | ---
5. | The **Purchase Order** page is displayed. Click the **Collapse (Ctrl+Y) Menu** button.
6. | Before adding a line to a PO the standard process steps should be followed for change orders:

1. Select the **Change Order** icon  
2. Select the **Finalize Document** icon.  
3. Select the **Dispatch Method** - Print or Email.
7. | The **Add Multiple New Rows** button is located at the end of each line on the PO. When selected the functionality will allow you to add 1 to multiple lines at one time. Click the **Add multiple new rows at row 1 (Alt+7)** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | **The pop up box defaults to 1 line to add. The number can be changed to add any number of additional lines to the PO.**  

Click the **OK** button. |
| 9.   | **A new line** is now added to the PO. **Add a new line function does not copy** the information from the previous line. **If applicable copy the information from the previous line i.e. description, category etc., to the new line and make corrections as needed.** The Chartstring information is always required for a new line. |
Step | Action
--- | ---
10. | Navigate to the Chartfield and Distributions area for the new line to enter the chartfield information.

Click the **Schedule** button.
### Step | Action
--- | ---
11. | The **Schedules** page is displayed.  
  
  Click the **Distributions/ChartFields** button.
12. | The **Distributions** page is displayed for the new line, in this example (line 2) of the PO. Enter the applicable Chartstring information for the line.  
  
  Continue with any remaining activities necessary to complete the PO change order process including adding comments as to why the line was added.  
  
  Be sure to Save the changes to initiate workflow and route the change order to the PO Change Order Approver to review via the worklist.
13. | This completes the exercise  
  **End of Procedure.**
Cancel a Line from a PO

There may be a need on occasion to cancel a line from a Purchaser Order. The cancel button located on the status tab.

**Note:** A line cannot be cancelled if there is receiving for the line. The receipt would need to be cancelled. A line cannot be cancelled if vouchers exist for the line.

Procedure

In this example a line is canceled from a Purchase Order.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
4. | Click in the **PO ID:** field.

5. | Enter the desired information into the **PO ID:** field. Enter a valid value e.g. “2000001232”.

6. | Click the **Search** button.
### Step 7
The **Purchase Order** page is displayed. Click the **Collapse (Ctrl+Y) Menu** button.

### Step 8
Before a line is canceled for a PO the standard process steps should be followed for change orders:
1. Select the **Change Order** icon
2. Select the **Finalize Document** icon.
3. Select the **Dispatch Method** - Print or Email.

### Step 9
Select the **Statuses tab** to navigate to the functionality that enables cancellation of a line.

Click the **Statuses tab**.

### Step 10
The **Statuses** tab is displayed. Select the **Cancel** Icon to cancel the line. A line cannot be canceled if it has vouchers associated with it.

Once a line has been canceled it cannot be reopened or any other action taken against it.

Click the **Cancel Line** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 11. | A warning message is displayed that the line will be cancelled for the PO. Click Yes to bypass this message and cancel the line.  
Click the Yes button. |
| 12. | A warning message is displayed that there are associated requisitions available for re-sourcing. **Always select Yes** to close the associated requisition line.  
Click the Yes button. |
| 13. | The line is now in a status of **Canceled**.
Continue with any remaining activities necessary to complete the PO change order process including adding comments as to why the line was cancelled.  
Be sure to Save the changes to initiate workflow and route the change order to the PO Change Order Approver to review via the worklist. |
| 14. | This completes the exercise **End of Procedure.** |

**Approve PO Change Orders**

The following topic illustrates the process followed when approving a PO Change Order via the worklist. The PO Change Order Approver should always add a comment as to why the PO Change Order is being denied for approval. The following occurs when the denial is saved.

**PO Change Order is Approved:**

- goes through two way matching (Voucher and PO)
- voucher is paid based on vendor terms

Procedure

In this example the PO Change Order Approver, **Approves** a PO Change Order via the worklist.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To review PO Change Orders for <strong>Approval</strong> or <strong>Denial</strong>&lt;br&gt;Click the <strong>Worklist</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 2.   | To filter for **PO Change Orders** only the Doc Type Filter function is used.  
*Click the **Doc Type** list.* |
3. If there are PO Change Orders available for review in your worklist the option will be visible for selection. If there are none to be reviewed the PO Change Order doc type option will not be present for selection.

Click the **PO Change Order** list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>To save the PO Change Order Doc Type in the filer and return results for only PO Change Orders the Worklist hyperlink is selected again. Click the <strong>Worklist</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>The results displayed are now limited to PO Change Order doc types. To view only the worklist, minimize the left hand menu. Click the <strong>Collapse</strong> (<em>Ctrl+Y</em>) <strong>Menu</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>To review the PO Change Order click on a hyperlink for the change order under the <strong>Link</strong> column. In this example the following link is selected. Click the <strong>2285, 10000, 2000001247, IMLSA, 12130, 20291, , IMBLD</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>7.</td>
<td>The Purchase Order Approval Action page is displayed. To view additional information related to the <strong>Lines</strong> section select to expand the section. Click the <strong>Expand section</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>The lines row section is expanded and displays more detailed information. To view comments entered if necessary related to the PO Change Order Preparer as to why the change order was created select to View the PO. Click the <strong>View PO Info</strong> link.</td>
</tr>
</tbody>
</table>
9. The Purchase Order Inquiry page is displayed. To view comments related to the PO select the Header Comments hyperlink.

Click the **Header Comments**... link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>The PO Header Comments page is displayed. The Comments entered by the PO Change Order Preparer are listed for review. They should include the date, preparer's name, change made and reason. Once reviewed select Cancel or OK to exit the page. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
### Step 11

You are returned to the **Purchase Order** page. To return to the **Worklist** page click Cancel from the Purchase Order page.

**Click the Cancel button.**

### Step 12

The **PO Approval Action** page is displayed. In this example the PO Change Order Approver **Approves** the reason for the change order. In this example the approval is related to **Change Order 1**.

If needed the approver can also view and print a copy of the draft PO from the page by selecting the **View Printable PO** button. The selection must be made prior to approving the PO. The button is grayed and no longer available for selection after the action is saved.

Approved PO Change Orders go through two way matching Voucher & PO. If successfully matched and approved the vendor is paid based on current vendor terms.
### Deny PO Change Orders

The following topic illustrates the process followed when denying a PO Change Order via the worklist. The PO Change Order Approver should always add a comment as to why the PO Change Order is being denied for approval. The following occurs when the denial is saved.

**PO Change Order is Denied:**

- An email is sent to the PO Change Order Preparer with comments from the PO Change Order Approver as to why the change order was denied
- The PO Change Order Preparer takes appropriate action
Procedure

In this example the PO Change Order Approver, **Denies** a PO Change Order via the worklist.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To review PO Change Orders for <strong>Approval</strong> or <strong>Denial</strong>&lt;br&gt;Click the <strong>Worklist</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 2.   | To filter for **PO Change Orders** only the Doc Type Filter function is used.  
      | Click the **Doc Type** list. |
Step 3. If there are PO Change Orders available for review in your worklist the option will be visible for selection. If there are none to be reviewed the PO Change Order doc type option will not be present for selection.

Click the **PO Change Order** list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | To save the PO Change Order Doc Type in the filer and return results for only PO Change Orders the Worklist hyperlink is selected again.  
Click the **Worklist** link. |
| 5.   | The results displayed are now limited to PO Change Order doc types. To view only the worklist, minimize the left hand menu.  
Click the **Collapse (Ctrl+Y) Menu** button. |
| 6.   | Click the **2307, 10000, 2000001250, IMMCB, 12160, 11590, , IMJT1** link. |

![Image of the Worklist interface with a filter applied.](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Expand section</strong> button.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>View PO Info</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Header Comments...</strong> link.</td>
</tr>
</tbody>
</table>

**Header Comments**... link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Cancel</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Cancel</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>Approval Action</strong> list.</td>
</tr>
<tr>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>13.</td>
<td>Click the <strong>Deny</strong> list item.</td>
</tr>
</tbody>
</table>

Deny
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Enter the desired information into the <strong>Comment</strong> field. Enter a valid value e.g. &quot;tax should be assessed for this item&quot;.</td>
</tr>
<tr>
<td>15.</td>
<td>Click the <strong>Spell Check Comments (Alt+5)</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
16. | Click the **OK** button.  
17. | The **PO Approval Action** page is displayed. In this example the PO Change Order Approver **Denies** the reason for the change order. In this example the denial is related to **Change Order 1**.  

If needed the approver can also view and print a copy of the draft PO from the page by selecting the **View Printable PO** button. The selection must be made prior to denying the PO. The button is grayed and no longer available for selection after the action is saved.  

Comments related to the denial are sent via email to the PO Change Order Preparer to review and take appropriate action.
### Eliminate Resourced Requisition Pre-encumbrance

When entering a PO Change Order, the first step is to select the Change Order icon and the second step is to select the Finalize Document icon. This second step is to prevent the requisition from being re-sourced which would create a new pre-encumbrance.

The BAIRS Ledger report below is an example what could occur if the Finalize Document process is overlooked. A new pre-encumbrance was created for Purchase Order 2000001280 in the amount of $13,741.54.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>Once the page is saved the PO Change Order will no longer be visible on the PO Change Order Approver’s <strong>Worklist</strong>. Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>19.</td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
Procedure

In this example the Finalize Document process is run to remove a pre-encumbrance that appears on the department’s ledger.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>When entering a PO Change Order, the first step is to select the Change Order icon and the second step is to select the Finalize Document icon. This second step is to prevent the requisition from being re-sourced which would create a new pre-encumbrance.</td>
</tr>
</tbody>
</table>

The BAIRS Ledger report displayed is an example of what could occur if the Finalize Document process is overlooked. A new pre-encumbrance was created for Purchase Order 2000001280 in the amount of $13,741.54.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Purchasing</strong> link.</td>
</tr>
</tbody>
</table>

![Image of a software interface with a list of options, including Purchasing]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Purchase Orders</strong> link.</td>
</tr>
<tr>
<td></td>
<td><em>Purchase Orders</em></td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Add/Update POs</strong> link.</td>
</tr>
<tr>
<td></td>
<td><em>Add/Update POs</em></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 5.   | Enter the Purchase Order number listed on the BAIRS report related to the pre-encumbrance.  
In this example  
Enter the desired information into the **PO ID:** field. Enter a valid value e.g. "2000001280". |
| 6.   | Click the **Search** button. |
Step | Action
--- | ---
7. | **The Purchase Order page** is displayed.

**Note:** The Change Order icon is not used in this process. If the PO Change Order Preparer clicks on the Change Order icon during this process, the action will route through workflow to be approved by the PO Change Order Approver.

To remove the pre-encumbrance for the purchase order, Click the **Finalize Document** button.

8. | A warning message is received that all eligible distributions will be finalized. Select OK to bypass the message and finalize the related requisition.

Click the **Yes** button.
9. You are returned to the **Purchase Order** page. To save your changes, click Save.
   Click the **Save** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>After the Finalize Document step is complete the PO is saved. The Pre-encumbrance will be removed during the nightly batch process and reflected in BAIRS the next day. The BAIRS report displayed shows that the Pre-Encumbrance has been reversed for the purchase order.</td>
</tr>
<tr>
<td>11.</td>
<td>This completes the exercise <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>