

CHANGE ORDERS

The **Change Order** process is used when a Purchase Order has been created and something changes (price increase/decrease, qty., item(s) are no longer available, etc.). All changes to a purchase order must be initiated by the end-user at the requisition level. This allows for review and workflow approvals. Once approved and processed, the PO will then be updated and emailed back to the supplier.

Below are the steps to process a change order for any Purchase Order that has not been received. If the PO has been received, the end user will need to request from their respective **Receiving Department** to have the PO “un-received” until the change has been processed. Once the change is complete, it is the end users responsibility to notify receivers to re-receive the PO in PeopleSoft.

Use the following navigation to process **Change Orders**:

❖ **Finance Dashboard>Procurement>Manage Requisitions**

The screenshot displays the 'Finance Self Service' portal interface. On the left is a navigation sidebar with the following items: Finance Dashboard (circled in red), Training (How To), Procurement (circled in red), Create a Requisition, Manage Requisitions (circled in red), Add/Update Supplier, Receive an Item, Request a Payment, Travel & Expense, Manager Self Service, Reports, Employee Self Service, and Finance Self Service. The main content area features a large grey announcement box titled 'New HCM and Finance Portal!' with the following text: 'PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Options.' Below the text is a 'Read More' button. To the right of the announcement is an 'Employee Quick Links' section with icons and links for MY PAYCHECKS, TIMESHEET, BENEFITS SUMMARY, and PERSONAL INFORMATION SUMMARY. Below this is a 'Help and Support' button and a 'Training (How to)' section with expandable links for Finance and Human Resources. At the bottom left is the San Diego Community College District logo. At the bottom right are logos for San Diego City College, San Diego Mesa College, San Diego Miramar College, and San Diego Continuing Education, along with the copyright notice: © San Diego Community College District | Disclaimer.

****NOTE: To search for a Purchase Order or Requisition that needs to be edited. The Business Unit and either the Requisition ID or the PO ID fields MUST be populated.**

Enter the information in the fields in **RED** below and click **Search**.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	MIR01	Bid No/Quote	
Requisition ID		Request State	All but Complete
Date From		Date To	
Requester		Entered By	
		PO ID	MIR0001111

Search Clear Show Advanced Search

Once the correct **Req ID** number is located, click on the dropdown on the far right, select **Edit** and click **GO**.

****NOTE: If you do not have the Edit option, notify your campus Business Services Office to obtain access. If you are at the District Office, contact IT to request access.**

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Bid No/Quote	BU	Date	Request State	Budget	Total	
▶ MRR0001031	415183 2/24/16	MIR01	03/01/2016	PO(s) Created	Valid	950.73 USD	Edit Go

This **pop-up** message should appear stating, "The Requisition is approved". Click **OK** on that message to be directed to the **Edit Requisition – Review and Submit** screen below.

Request State: All but Complete Budget Status: [dropdown]

Date To: 06/07/2016

Message

This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)


Click OK to continue, or click Cancel to go back.

OK Cancel

MIR01 03/01/2016 PO(s) Created Valid 950.73 USD Edit Go

On the **Edit Requisition – Review and Submit** screen, click on the line item description to drill into any of the line(s) that need to be edited/adjusted.

****NOTE: If there is a lock next to the line item, it cannot be edited. Contact the Buyer for assistance.**

Edit Requisition - Review and Submit 

Review the item information and submit the req for approval.

 My Preferences  Requisition Settings

Requisition Summary










Business Unit	<input type="text" value="MIR01"/>	San Diego Miramar College	Bid No/Quote	<input type="text" value="415183 2/24/16"/>
Requester	<input type="text" value="CMORENCE"/>	Cheyanna Marence	Requisition ID	MRR0001031
Currency	USD		Priority	<input type="text" value="Medium"/>
			Track Batch	1
			Current Change Reason	

Cart Summary: Total Amount 950.73 USD

Expand lines to review shipping and accounting details

 Add More Items

Requisition Lines 

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	 MOLD RELEASE 3EA		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="3"/>	EACH	11.475	34.43		 Edit	
▶ <input type="checkbox"/> 2	 UNI-DIRECTIONAL FIBERGLASS TAP		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="100"/>	EACH	1.573	157.30		 Edit	
▶ <input type="checkbox"/> 3	 AN426AD3-5 RIVETS, 5LBS AT S33		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="5"/>	EACH	28.688	143.44		 Edit	
▶ <input type="checkbox"/> 4	 GLOVES* 10EA PKG OF 100		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="10"/>	EACH	11.475	114.75		 Edit	

On the **Edit Requisition** page under the **Create Requisition** field, adjustments can be made to the description/price, or quantities of the requisition. Edit as many lines as necessary by following the process above and click **Apply** to each. Add any additional comments in the **Additional Information** box below.

****NOTE: If you need to update the text within a PO, contact the assigned Buyer for assistance.**

Create Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description
*Price *Currency
*Quantity *Unit of Measure
*Category Due Date

Supplier

Supplier ID
Supplier Name AIRCRAFT SPRUCE & SPECIALTY CO
Supplier Item ID

Manufacturer

Mfg ID
Manufacturer
Mfg Item ID

Additional Information

Send to Supplier Show at Receipt Show at Voucher

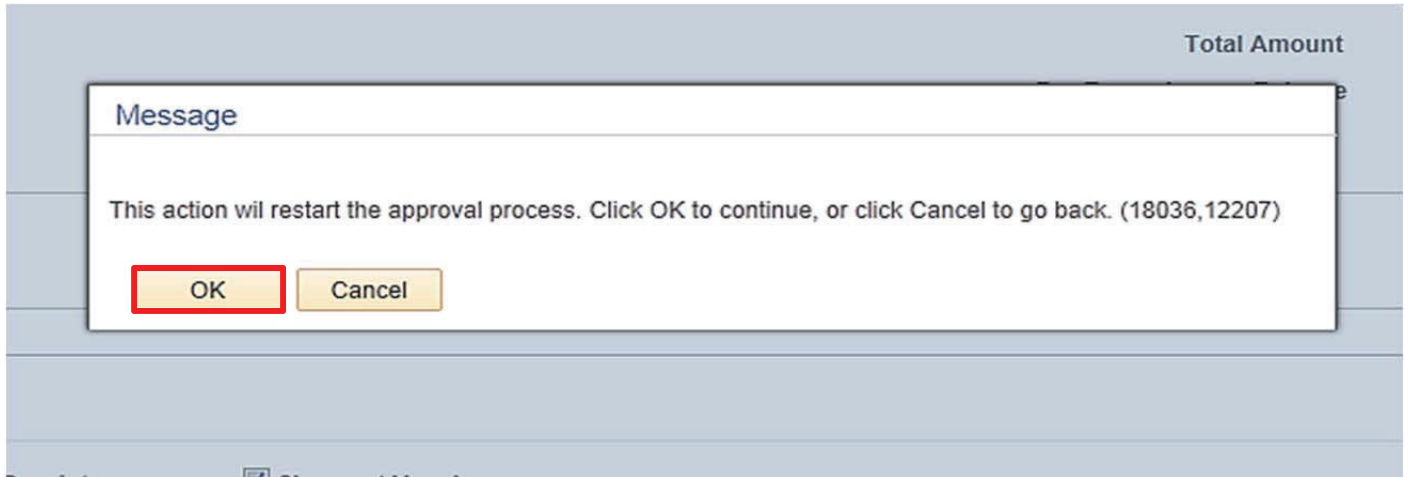
Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

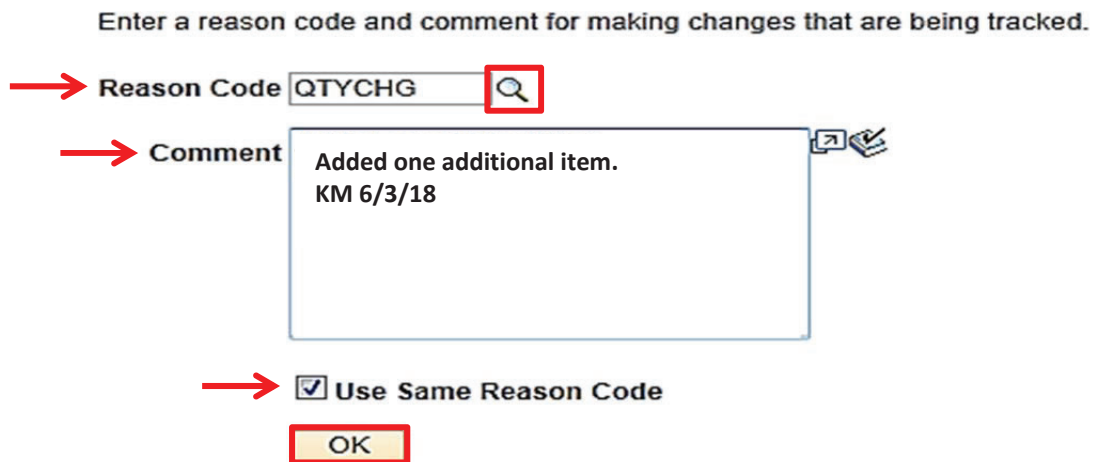
Once completed, you will be routed back to the **Review and Submit** page. Scroll to the bottom of the screen and click on **Check Budget**.



Click **OK** on the **pop-up** message that appears below.



The **Change Order** box will appear. Please select a **Reason Code** (select the code that is most applicable). In the comment box, provide a description of the change(s). At the end, add the end user/initiator's initials and date of change (see example). Then Check the **Use Same Reason Code** box then click **OK**. If the reason is to increase/decrease an Amount Only, enter the new amount in the comments box.



The final page is the **Confirmation** page and here the **Change Request(s)** is listed at the bottom of the page. All Change Orders will go back through the workflow approval process, which is detailed below.

Once approvals are completed, the system will automatically notify the assigned Buyer that there is a change to the Purchase Order.

Confirmation

Your requisition has been submitted.





Requested For	Cheyanna Morence	Number of Lines	11
Bid No/Quote	415454 02/26/16	Total Amount	939.50 USD
Requisition ID	MRR0001031		37.75 USD
Business Unit	MIR01		
Status	See Lines		
Priority	Medium		
Budget Status	Valid		
Track Batch	2		

 View printable version
  Edit This Requisition
  Check Budget
  Pre-Check Budget

Req Approval

▼ **Line 2: Pending** View/Hide Comments
 ENGINE OIL PRESSURE GUAGE Start New Path

Miramar Req Approval

Pending Not Routed Not Routed Not Routed
 Ornelas, Lynne →  Multiple Approvers →  Multiple Approvers →  Multiple Approvers
 SDCCD Budget Approvers MIR01_ePro_Level_Two_Apprs SDCCD CGSF Approvers One Route to Primary Buyer

▶ **Comment History**

▼ Change Request/Line Approval Summary			
Line	Item Description	Change Request	Line Re-Approval
2	ENGINE OIL PRESSURE GUAGE	Created	Routed for Approval