

Procurement: Modifying Requisitions/PO Change Orders/PO Cancellations

Overview

- This job aid is intended to instruct Procurement Requesters how to modify requisitions or create PO change orders.
- What is the difference between modifying a requisition and creating a change order?
 - As a Procurement Requester, you can modify a recently submitted requisition **ONLY** if it is still in pending approval status. If the requisition is in pending approval status, you can withdraw and edit the requisition then resubmit.
 - Once a requisition is in approved status and a PO is created, Procurement Requesters must create a change order to the PO by entering through the requisition.
 - A few examples of what can be changed via Change Order by a Procurement Requester:
 - Supplier Site
 - Quantity
 - Ship to Location
 - Additional Information (custom fields or descriptive flexfields)
- If I modify the requisition, will it still route for approval?
 - Yes. Even if withdrawn, edited and resubmitted requisitions will route through the designed requisition approval as if it were a fresh requisition.
- When can't I create a change order?
 - You cannot create a change order if you have fully received goods.
- If I create a change order, will the PO route for approval?
 - Yes – only if the value of the PO has increased. If there is a reduction in the PO, the change order will auto-approve. If the document total amount increases, the workflow is designed as such: if non-Project funded, the PO change will route to the Cost Center Manager for approval. If Project-funded, the PO change will route to the Project Manager for approval. After approved by one of those parties, the change order will route to the Procurement Director if greater than \$25,000 and less than or equal to \$100,000. After approved by the Procurement Director, the change order will route to the Controller if greater than \$100,000.
- Canceling a PO
 - You can cancel a Purchase Order by entering the requisition and clicking cancel Requisition. This will in turn cancel the existing Purchase Order. Please note: when you cancel a requisition, it cancels a PO, but the requisition will stay in approved status.



- You cannot cancel a PO with a pending change order.
- The PO cancellation will automatically be communicated to the Supplier through iO. You cannot cancel a PO if there is a pending change order.
- Please review the Requisition and PO Lifecycle job aid for more details

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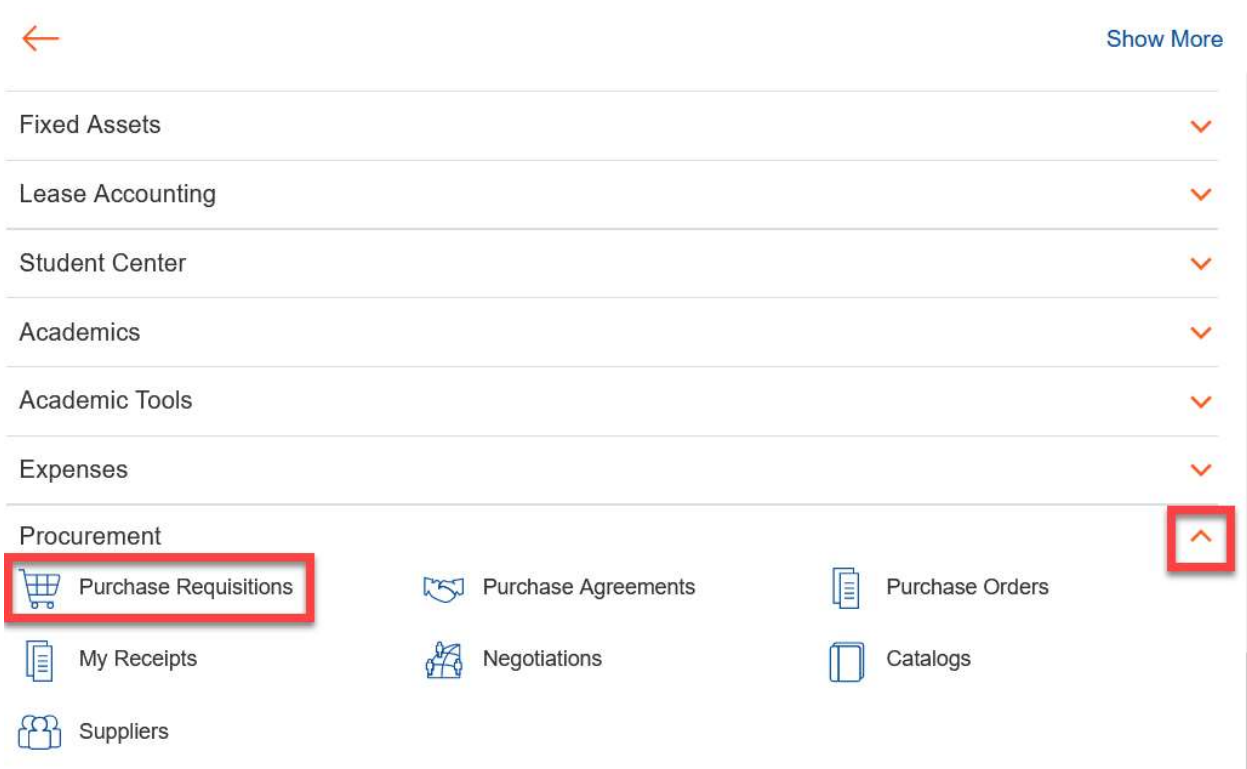
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I. Modifying a Recently Submitted Requisition

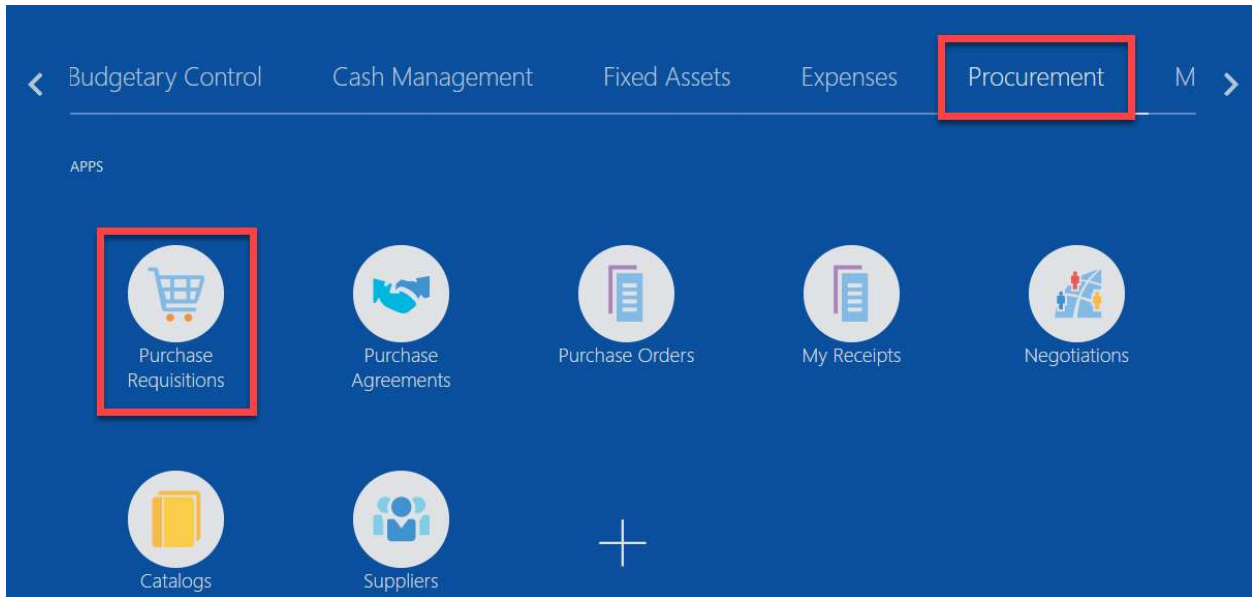
- I. *Please Note:* Requisition must be in PENDING APPROVAL status! The **Purchase Requisitions** task can be accessed two ways:
- (Option 1) Click the **Navigator** icon in upper left-hand corner of the iO landing page.



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



- (Option 2) Under the **Procurement** tab on the home page, scroll down and click on the **Purchase Requisitions** tile on the main page.



2. Upon entering the **Purchase Requisitions** tile, click on **Manage Requisitions** section.



3. From here, click on the link of the **Requisition number** you would like to modify. *Please Note: the status should read PENDING APPROVAL.*

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ00000442	Subaward agreement between Rice University and Baylor University	02/18/2021	48,000.00 USD	Pending approval	Not reserved	

4. To withdraw the requisition from workflow and edit it accordingly, click on **Actions > Withdraw and Edit**.



5. Click **Yes** to move forward and withdraw the requisition from workflow.

Warning X

This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.

Do you want to continue?



- 6. From here, you can make any changes to the requisition you wish. For example, updated funding, change price, edit the description, change the quantity, etc.

Requisition Lines

Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.

Actions View Format [Edit] [X] Freeze Detach Wrap

Or

Line 1: Details

Delivery

* Requester: Kissel
Urgent: No
Requested Delivery Date: 02/19/2021

* Deliver-to Location: Abercrombie/01B137
Deliver-to Address: 76100 Main Street, HOUSTON, HARRISTX 77005, UNITED STATES

Billing

View Format [X] [←] Freeze Detach Wrap

Project Costing Details

Distribution	Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Charge Account Nickname	Charge Account	Budget Date	Percentage	Amount (USD)
1	R1A640	1	02/19/2021	SUB Sub-Contr...	21213-JGSB	R1A640-A	Department	10.00100.100.000000.5100.100.9999.9999	10.00100.100.000000.5100.100.9999.9999	02/18/2021	52.08333333%	25,000.00
2	R1A640	1	02/19/2021	SUB Sub-Contr...	21213-JGSB Ad...	R1A640-A	Department of D...	10.00100.100.000000.5100.100.9999.9999	10.00100.100.000000.5100.100.9999.9999	02/18/2021	47.91666666%	23,000.00
Total											100	48,000.00

- 7. After confirming that the requisition is fully correct and complete, click **Save** and then select **Check Funds** to confirm that budgetary funds are available.



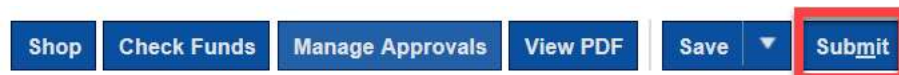
- 8. On the pop-up, click **OK**.

Confirmation X

The transaction passed the funds check process.

View Funds Check Results **OK**

- 9. Review the information and then click the **Submit** button.



- 10. On the confirmation pop-up, select **OK** to close the pop-up. Your requisition has been re-submitted for approval.



2. Creating Change Order

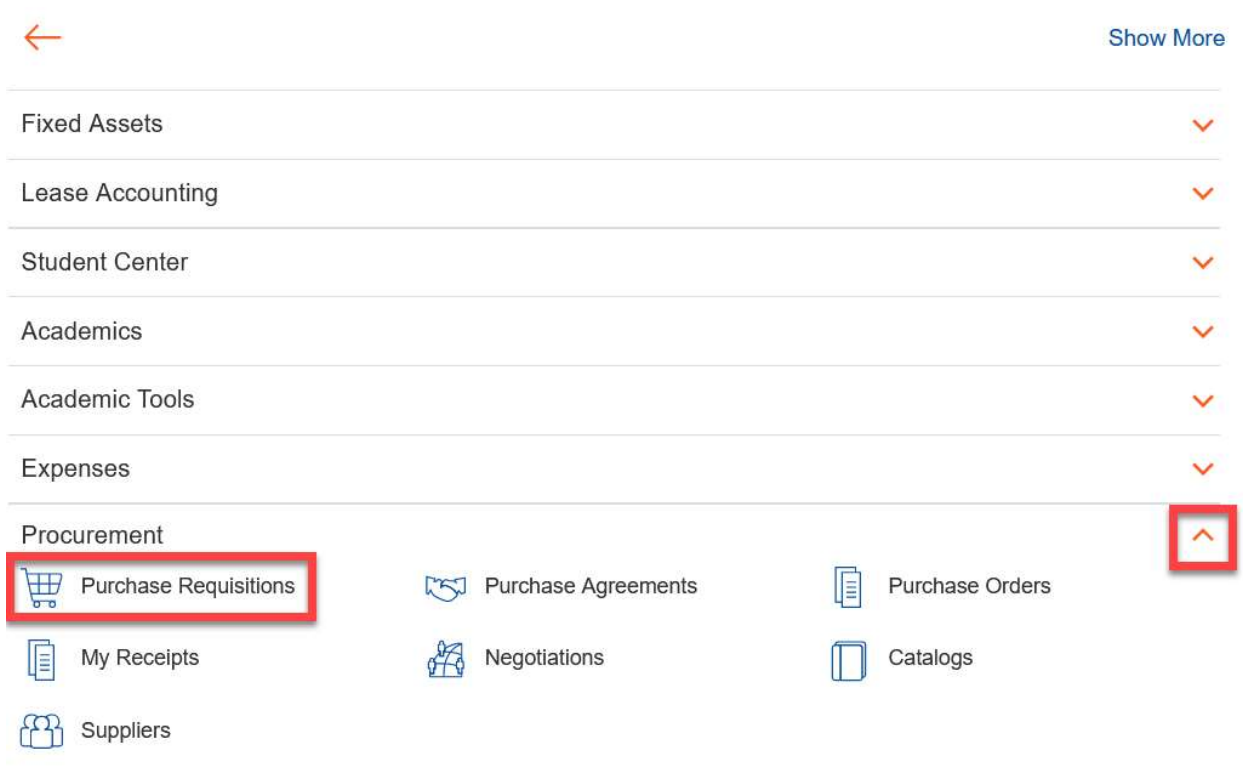
If your requisition has already been approved and PO created, you will need to create a change order on the PO. This is only available for non-Punchout orders due to the nature of the punchout process (Change Orders are not integrated because POs are quickly fulfilled).

I. The **Purchase Requisitions** task can be accessed two ways:

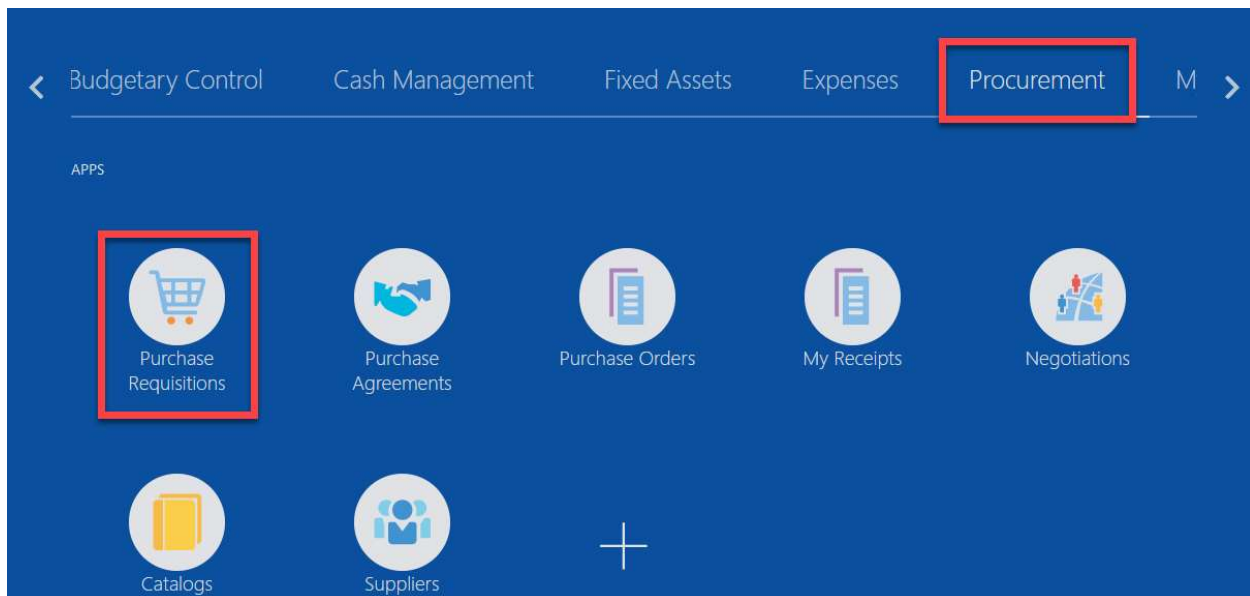
- a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the iO landing page.



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



b. (Option 2) Under the **Procurement** tab on the home page, scroll down and click on the **Purchase Requisitions** tile on the main page.



3. Upon entering the **Purchase Requisitions** tile, click on **Manage Requisitions** section.



- You should see a list of your recently submitted requisitions. From here, click on the link of the **Requisition number** for which you would like to edit the corresponding Purchase Order. Note: the requisition status should read **APPROVED**.

Search Results

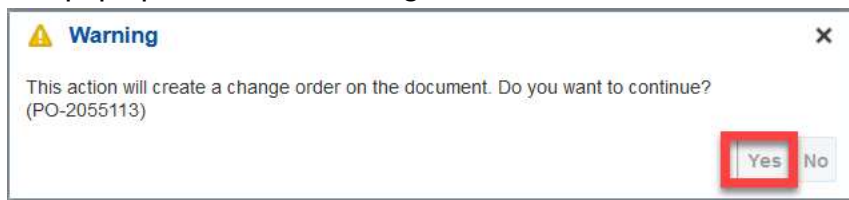
Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ0000425	Temporary accounting and bookkeeping services for George R. Brown School of Engineering	02/16/2021	100.00 USD	Approved	Liquidated	X03000312

- To edit the Purchase Order, click on **Actions** then **Edit Order**.



- Select **Yes** to the pop-up to create the change order.



- From here, you can make various changes available to the purchase order. First, add a **Description** of the change. This is required.

Edit Change Order: 1

Check Funds Manage Approvals Actions Save Submit Cancel

Change Order 1 Status Incomplete Initiating Party Requester

* Description Change funding to a different chart of accounts string Amount Changed 0.00 USD Initiator Kisser

Creation Date 02/18/2021 Funds Status Not Applicable Type Internal

- Now, move forward with the change you need to execute.
 - If you would like to change line level details, click the **pencil icon**:

Main

General

Lines Schedules Distributions

Actions View Format Edit Item Freeze Detach Wrap

* Line	* Type	Edit Item	* Description	* Category Name	Quantity	UOM	* Base Price	Price	Ordered	* Location	Change Reason
1	Fixed Price		Temporary accounting and bookkeeping services for George R. Brown S Professional Services				100.00	100.00	100.00	Abercrombie	

b. If you would like to change quantity, you must change it in all three tabs: **Lines**, **Schedules**, and **Distributions**. If you would like to change the Distribution, follow these steps:

i. Click the **Distributions** section.

Line	Description	Deliver-to Location	Quantity	UOM	Ordered	PO Charge Account	Budget Date	Change Order Funds Status	Change Reason	Additional Information
1	Temporary accounting and bookkeeping services for George R...	Abercrombie/0	100.00		10.00100	100.000000 5100 100.9999.9999.999.999	02/16/2021	Not Applicable		Work Task Number (TRIRIGA)

ii. Select the **arrows** then **Split**.

Line	Description	Deliver-to Location	Quantity
1	Temporary accounting and bookkeeping services for George R...	Abercrombie/0	100.00

iii. An additional line will appear. To change the funding for the entire line, change the quantity/amount of the first line to 0 and change the new line to the total quantity/amount ordered.

Line	Description	Deliver-to Location	Quantity	UOM	Ordered
1	Temporary accounting and bookkeeping services for George R...	Abercrombie/01/B137	0.00		0.00
1	Temporary accounting and bookkeeping services for George R...	Abercrombie/0	100.00		100.00

iv. Highlight the new line, then select the **pencil icon** to change the CoA or Project as you wish on the new distribution line (2).

► General ?

Lines Schedules **Distributions**

Line	Description	Deliver-to Location	Quantity	UOM	Ordered
1	Temporary accounting and bookkeeping services for George R...	Abercrombie/0	100.00		100.00

- v. If you are changing from project to CoA, you must **delete** the project information first.

Project Details

Project Number

Task Number

Expenditure Organization

Contract Number

Expenditure Item Date

Funding Source

Expenditure Type

- vi. Then, **update the Chart of Accounts** as needed.

Billing

PO Charge Account

PO Accrual Account 10.75000.100.000000.3041.100.9999.9999.999.999

Budget Date 02/16/2021

PO Variance Account 10.00100.100.000000.5100.100.9999.9999.999.999

- vii. Click **OK**.

- 9. Upon making those update, click **Save** and **Check Funds**.

- 10. Once document passes funds check, select **OK**.

Confirmation x

The document passed funds check.

- 11. You have now successfully submitted the change order. At this point, the change order will route based on workflow design.

- a. If total value of the purchase order is less than \$10,000, then the change order will auto-approve. Also, any reduction in PO value will auto-approve.
- b. If the value of the purchase order is greater than \$10,000 and less than \$100,000...
 - i. And charged to a Project, then the Project Manager and Procurement Director must approve.
 - ii. And charged to a Chart of Accounts string, then the Cost Center Manager and Procurement Director must approve.

- c. If the value of the purchase order is greater than \$100,000, the purchase order will route to the above to approve and to the Controller.

3. How do I know if my Change Order has been implemented?

- 1. Remember: change orders edit **Purchase Orders** but have **NO IMPACT** on the original requisition. In the screenshots below you will notice that the requisition remains the same as the original request to purchase goods/services, but the PO now reflects the fields changed via PO.

a. Original Requisition:

Requisition: REQ0000443

Check Funds View Life Cycle Actions Done

Requisitioning BU GENERAL
Entered By Kissel
Description Pencils for lab

Creation Date 02/18/2021
Status Pending approval
Justification

Requisition Amount 100.00 USD
Approval Amount 100.00 USD
Funds Status Not reserved
Attachments None

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Line Type	Item	Revision	Description	Category Name	Cost Center	UNSPSC	Quantity	UOM	Secondary Quantity	Secondary UOM	Price	Price (USD)
1	Goods			Pencils for lab	Office Supplies	00100		100	EA			1.00 USD	1.00

b. Original PO:

Purchase Order: X03000324

View PDF Actions Done

Order Life Cycle

Main

General

Procurement BU GENERAL
Requisitioning BU GENERAL
Sold-to Legal Entity William Marsh Rice University LE
Bill-to BU GENERAL
Order X03000324
Status Open
Funds Status Reserved
Buyer One

Supplier McMaster-Carr Supply Co
Supplier Site BU-2 600 N Coun
Supplier Contact
Communication Method None
Bill-to Location Payables Bill To
Ship-to Location Abercrombie/01/B137

Ordered 100.00 USD
Total Tax 0.00 USD
Total 100.00 USD
Description
Requisition REQ00000443
Source Agreement
Supplier Order

Order Life Cycle: Ordered (Amount (USD))

Lines Schedules Distributions

Actions View Format Freeze Detach Wrap

Line	Type	Item	Description	Quantity	UOM	Base Price	Discount Type	Discount	Discount Reason	Price	Ordered	Total Tax
1	Goods		Pencils for lab	100	EA	1.00				1.00	100.00	0.00

c. Change Order:

Change Order 1
 Status Incomplete
 Amount Changed -50.00 USD
 Funds Status Not Applicable
 Initiating Party Requester
 Initiator Kissel
 Type Internal

Main

General

Schedules Distributions

Line	Description	Location	Quantity	UOM	Requested Delivery Date	Promised Delivery Date	Change Order Funds Status	Change Reason
1	Pencils for lab	Abercrombie	50	EA	02/19/2021	mm/dd/yyyy	Not Applicable	

Pending Change Order

Change Order 1
 Description Change quantity to 50
 Status Pending Approval
 Initiating Party Requester
 Initiator Kissel
 Creation Date 02/18/2021
 Amount Changed -50.00 USD

d. Edited PO:

Main

General

Procurement BU GENERAL
 Requisitioning BU GENERAL
 Sold-to Legal Entity William Marsh Rice University LE
 Bill-to BU GENERAL
 Order X03000324
 Status Open
 Funds Status Reserved
 Buyer One
 Creation Date 02/18/2021
 Supplier McMaster-Carr Supply Co
 Supplier Site BU-2 600 N Coun
 Supplier Contact
 Communication Method None
 Bill-to Location Payables Bill To
 Ship-to Location Abercrombie/01/B137
 Ordered 50.00 USD
 Total Tax 0.00 USD
 Total 50.00 USD
 Description
 Requisition REQ00000443
 Source Agreement
 Supplier Order

Lines Schedules Distributions

Line	Type	Item	Description	Quantity	UOM	Base Price	Discount Type	Discount	Discount Reason	Price	Ordered	Total Tax
1	Goods		Pencils for lab	50	EA	1.00				1.00	50.00	0.00

e. Requisition after Change Order (DOES NOT CHANGE):

Requisition: REQ00000443

Check Funds View Life Cycle Actions Done

Requisitioning BU GENERAL
Entered By Kissel
Description Pencils for lab

Creation Date 02/18/2021
Status Approved
Justification

Requisition Amount 100.00 USD
Approval Amount 100.00 USD
Funds Status Liquidated
Attachments None

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Line Type	Item	Revision	Description	Category Name	Cost Center	UNSPSC	Quantity	UOM	Secondary Quantity	Secondary UOM	Price	Price (USD)
1	Goods			Pencils for lab	Office Supplies	00100		100	EA			1.00 USD	1.00

4. Canceling a Purchase Order

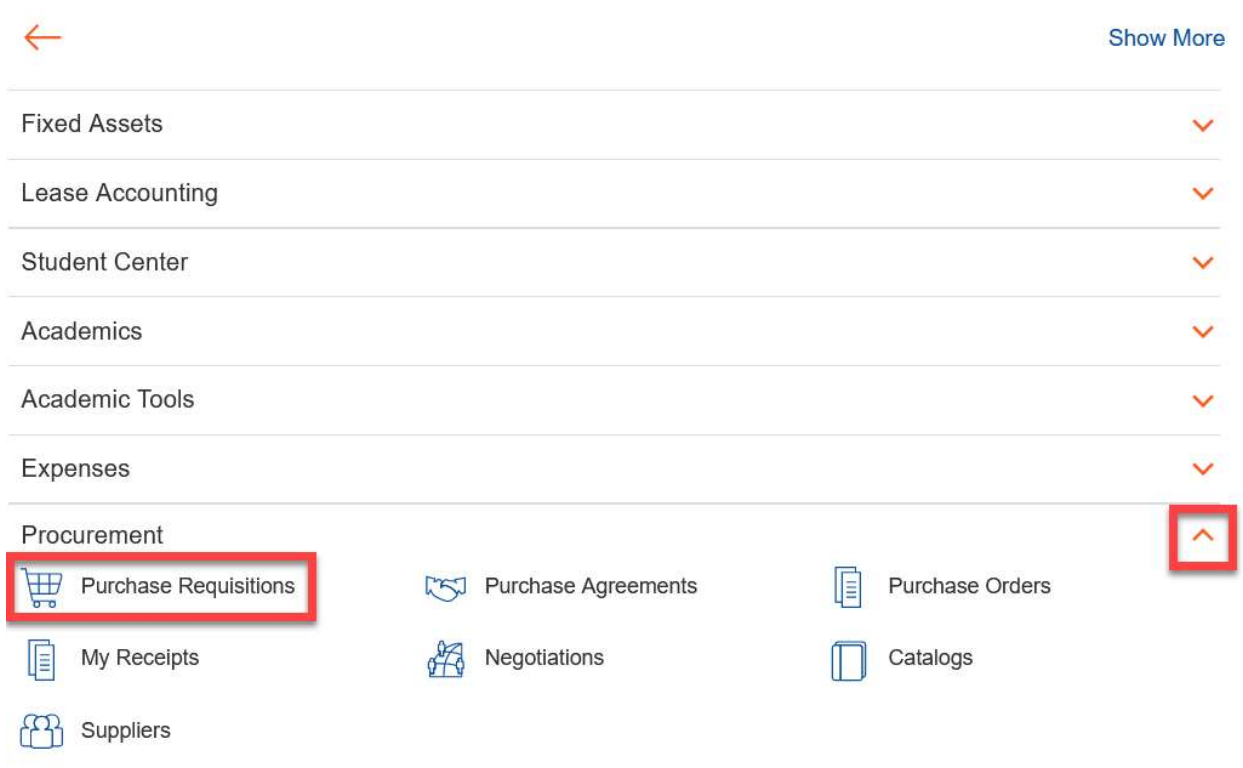
If your requisition has already been approved and PO created, you may need to cancel a PO. The following steps will lead you to do so.

I. The **Purchase Requisitions** task can be accessed two ways:

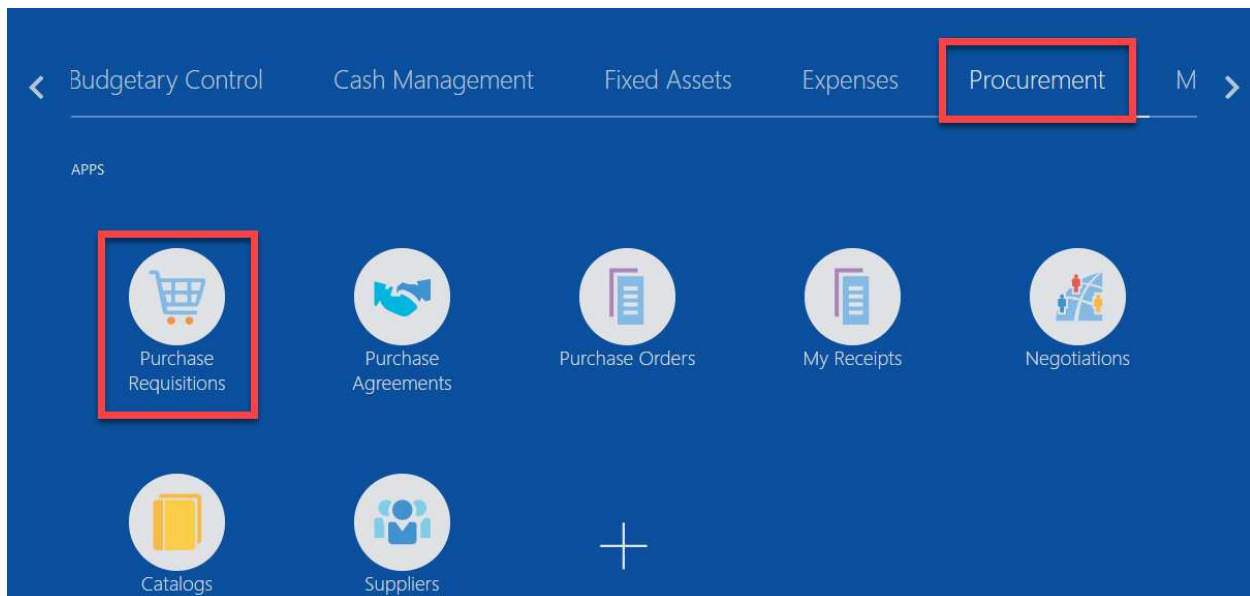
- a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the iO landing page.



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



b. (Option 2) Under the **Procurement** tab on the home page, scroll down and click on the **Purchase Requisitions** tile on the main page.



2. Upon entering the **Purchase Requisitions** tile, click on **Manage Requisitions** section.



- You should see a list of your recently submitted requisitions. From here, click on the link of the **Requisition number** for which you would like to cancel the corresponding Purchase Order. Note: the requisition status should read **APPROVED**.

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ00000425	Temporary accounting and bookkeeping services for George R. Brown School of Engineering	02/16/2021	100.00 USD	Approved	Liquidated	X03000312

- To cancel the Purchase Order, click on **Actions** then **Cancel Requisition**.



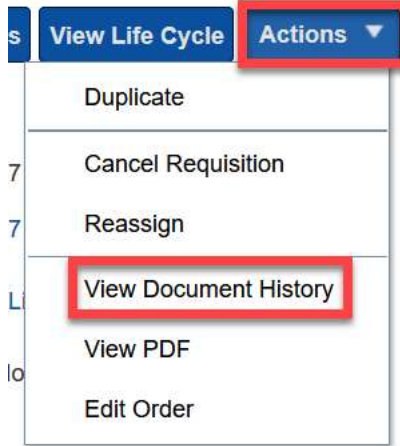
- Enter a **reason** for cancellation and then click **OK**.



- The Purchase Order has been canceled. Click **OK**.



- If you would like to see the history of the requisition, click on **Actions** then **View Document History**



8. You will now see all that has occurred for this requisition/PO:

Document History: REQ00000417 Done

Entered By Kissel
 Requisitioning BU GENERAL
 Requisition REQ00000417

Description Bostitch(R) B8(R) Impulse(TM) 45 Electric Stapler, Black
 Status Approved

View Format Freeze Detach Wrap

Action Performed	Performed By	Action Date	Reference Document	Additional Information
Submit purchase order	Kissel, Katie	05/13/2021 8:19 PM	PO X03000186 change 1	cancel PO
Submit purchase order	Sixteen, OConsultant	05/12/2021 8:23 PM	PO X03000186	
Submit requisition	Kissel, Katie	05/12/2021 8:21 PM	Requisition REQ00000417	
Reserve	Application	05/12/2021 8:22 PM		

9. You can also click on **View Life Cycle**



10. Then, click on the **PO number**

Requisition Life Cycle: REQ00000417 Done

Requisition Line

Line	Item	Description	Category Name	Requester	Quantity	UOM	Price	Amount (USD)	Status
1		Bostitch(R) B8(R) Impulse(TM) 45 Electric Stapler, Black	Office Supplies	Kissel, Katie				71.11	Approved

Order

Procurement BU GENERAL
 Requisitioning BU GENERAL
 Purchase Order X03000186
 Description
 Open Date 05/13/2021
 Total 0.00

Status Canceled
 Buyer Sixteen
 Supplier ABC Floras

II. You will see the PO status is **canceled**

Purchase Order: X03000186 [?](#)

[View PDF](#)

[Actions](#) ▾

[Done](#)

Main

General

Procurement BU GENERAL
Requisitioning BU GENERAL
Sold-to Legal Entity William Marsh Rice University LE
Bill-to BU GENERAL
Order X03000186
Status Canceled
Funds Status Liquidated
Buyer Sixteen
Creation Date 05/12/2021

Supplier ABC Florals
Supplier Site 1234 Flower Lan
Supplier Contact
Communication Method None
Bill-to Location Payables Bill To
Ship-to Location Abercrombie/01/A127-07

Ordered 0.00 USD
Total Tax 0.00 USD
Total 0.00 USD
Description
Requisition REQ00000417
Source Agreement
Supplier Order

[Terms](#) [Notes and Attachments](#)