Edit Purchase Orders

This guide will cover:

- How to modify and manage existing purchase orders through the change order process.

Step One

- Upon signing in, click on the Navigator button (three horizontal lines) in the top left corner.

- The Navigator bar is where you can find links directing you to all of the modules and pages for which you have access. For this particular process, select Purchase Requisitions.
The Purchase Requisitions screen will display.

Step Two

To locate the purchase order needing changed, click on the Manage Requisitions.

You can search for the Requisition needing a change order by entering one or multiple of the search fields marked with **. Then click Search.

Note: Requisitions Requiring Attention defaults to Yes. Depending on the requisition you are looking up, it may not require your attention. This field should be changed to show blank from the drop down.
Step Three
Create a change order on a purchase order to change information on the line (i.e. description, quantity, price etc.)

- Once you locate the desired requisition, you will find details of the requisition including associated purchase order number. Click on the Requisition number to open the requisition.

- This will open the Requisition page for the Requisition you selected:
  - To edit the order, click Actions > Edit Order

- A warning may display, select Yes.

- You will see the line(s) for the goods/services that were purchased at the bottom of the new page.
- Highlight the line that you wish to make changes on and click on either one of the Pencil icons.
The following page shows the fields that are available to change. Scroll to the bottom of this page to change Notes and Attachments information.

Once you have made your changes, click **OK** to return to the Edit Change Order page. Describe the reason for the change in the required **Description** field.

Select the **Submit** button in the top right corner of the page:
After you have submitted the revised order a Confirmation message will appear. Press OK.

Step Four
PO Charge Account changes*. 

*NOTE: PO Charge Account information on original distribution lines cannot be modified. Therefore, changes to PO Charge Account information will require you to add a new distribution line and then zero out the original distribution.

- Follow steps 1-2 to navigate to Manage Requisitions, and select a requisition you wish to change the charge account on a purchase order.
- From the requisition page, click Actions > Edit Order:

- This will bring you to the Edit Change Order page. In the General region, click on the Distributions tab. Highlight the distribution line that needs changed.
- Click on the **split distribution icon** under the **Distributions tab** to add another distribution line:

  ![Distributions Icon](image)

  - Enter the Quantity from the original distribution line on the new distribution line. Correct the charge account information on the new distribution line by clicking on the icon next to the PO Charge Account field. Lastly, to “cancel” the original distribution line, highlight the line and change the quantity to “0”.

  ![Distribution Table](image)

  - To allocate the cost of an order to multiple charge accounts, follow the above steps, except change the quantity so that the correct split is made between the multiple distributions. Enter the new charge account information as described above. Be sure to highlight the appropriate line.

  ![Requisition Lines](image)
- NOTE: Changes to distribution lines can also be made by clicking on the pencil icon once the new line is added – this will bring up the Edit Distribution page. Changes to the PO Charge Account would be made under the Billing section:

- Describe the reason for the change in the required Description field.
After all changes have been made, press the **Submit** button in the top right corner of the page:

A confirmation message will appear. Press **OK**:

The following changes will initiate the approval process:
- Quantity Increase
- Amount Increase
- Changes to the PO Charge Account

All other changes will result in an automatically approved change order.

You have now completed the steps to manage change orders.