ERP Job Aid RI Enterprise Resource Planning



Change orders

Change Order Types and Guidelines

Users may initiate a Change order for the following modifications:

- Attachment
- Cancel Line
- Lines (Add/Delete/Price/Description/Worktags)
- Order-From Connection (Site Code)

Important Notes:

- Change orders cannot be initiated on a Purchase Order that are In Process or Approved
- The Purchase Order must have an **Issued** status to proceed. It is recommended to filter Purchase Orders to '**Issued'** status for easy identification.

Disclaimer:

Once a Change Order process begins:

- Modifications cannot be saved for later.
- To cancel an in-process change order:
 - o Navigate to the relevant Purchase Order and select Version History.
 - Locate the **Pending Changes** section and open the Change Order.
 - Select the related actions (...) button next to the Version Number.
 - Hover over **Purchase Order Change** and select **Cancel**.
 - Restart the change order process if desired.

Process for Creating a Change Order:

1. Using the Workday Search Bar, type Find Purchases Orders and select the report.



2. Filter the Status field to Issued and select OK.

Find Purchase Orders		×
Company		Î
Supplier	:=	
Order-From Connection		
Buyer	Approved	
Purchase Order	Canceled	
Document Date On or After	Closed	
Document Date On or Before	Denied	
Due Date On or After	Dratt	
Due Date On or Before	✓ Issued	
Status	Pending Issue	
	× Issued	1
Issue Options		
Contract		
Requisition		
Requisition Types		
	Cancel	ок

- 3. Locate the **Purchase Order** you are initiating a Change Order on and select the related actions button next to the magnifying glass icon.
- 4. Hover over 'Purchase Order,' and select 'Create Change Order'.

Purchase C	Orders 12 items					
Purchase Order	Number	Company		Purchase Order Type	Status	Issu
Q	Actions		Purchase O	rder		
4	Purchase Order	<	Close			
0	Accounting	>	Close Lines	_		
4	Additional Data	>	Create Change Order Printable Version	1	ued	
Q	Budget Date	>	View Purchase Order (Changes	Ily Received	
	Favorite	>				

5. Use the menu icon in the **Reason** field to select the appropriate reason for the Change Order. (*Note: This is a one-option field – enter additional reason/justification in the Comments field.*)



6. Enter additional details to support the requested change in the **Comments** field.

- 7. Modify the Purchase Order as needed:
 - a. Attach Additional Documents
 - b. Cancel Line(s)
 - c. Modify Line Items (Add, Delete, Adjust Price or Description)
 - d. Change Order-From Connection (Site Code)
- 8. Select **Submit** to finalize the change order.

Approval Process

Once submitted, the change order follows an approval workflow

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Approved** status with a **Version Number**.
- View previous versions under:
 - Version History tab
 - o Printing Runs tab

Goods Lines	Version History	Process History	Attachments	Printing Runs	Balances		
Printing Runs 2 items	5						/= = = □ ." = 6
Printed Date				Issue Option		PDF File	
04/28/2025 11:32:51	АМ			Print		PO-1000000019 2025-04-28 08_32_51-0700.pdf	
04/24/2025 11:57:39	AM			Print		PO-1000000019 2025-04-24 08_57_39-0700.pdf	