ERP Job Aid
RI Enterprise Resource Planning

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Change Order Types and Guidelines

Users may initiate a Change order for the following modifications:

- Attachment
- Cancel Line
- Cancel PO
- 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.
- **Closing** a Purchase Order will release the encumbered funds; however, these funds will not be reinstated to the associated Supplier Contract (if applicable).
    - If the Purchase Order has been received or invoiced against, the line(s) must be reduced to reflect what has been received/invoiced to release the remaining balance back to the Supplier Contract.
      (**Note:** *A Purchase Order that has been received or invoiced cannot be canceled.)*

Disclaimer:

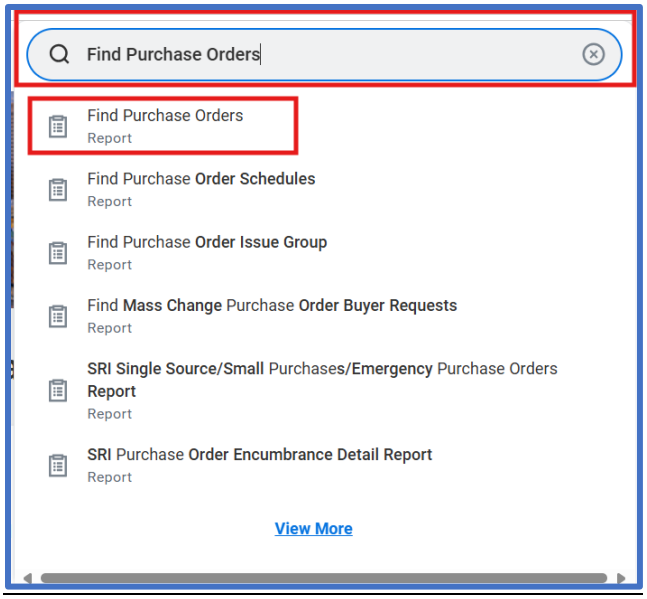
- The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.

(**Note:** *If the PO is a release PO (Buyer Auto Create) you must reach out to the Buyer of the Supplier Contract to manually cancel the PO.)*

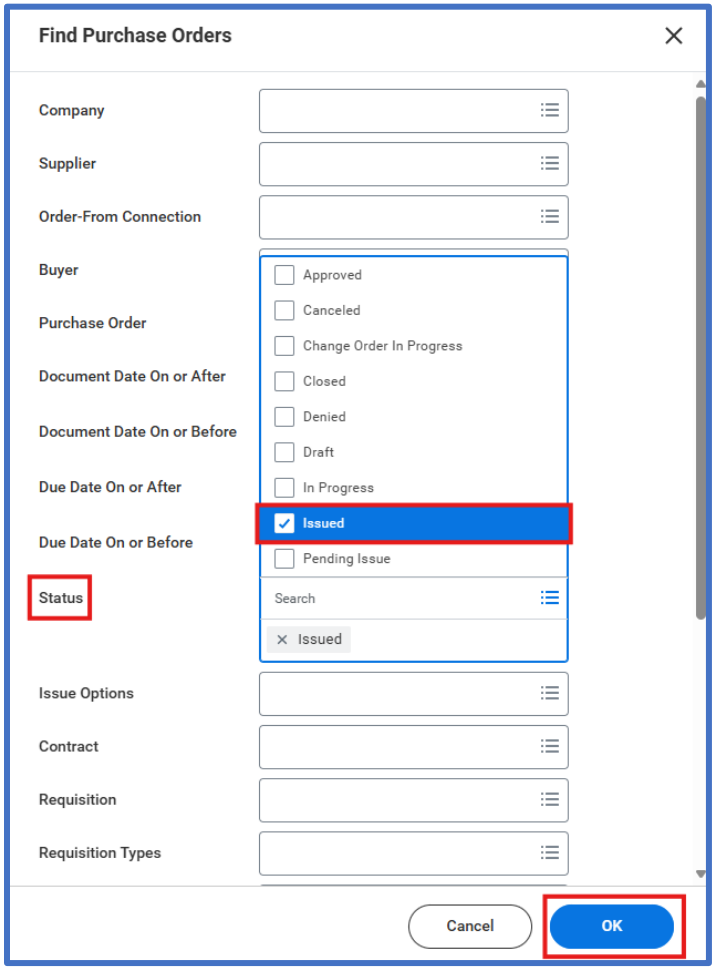
- Once a Change Order process begins:
  - Modifications **cannot** be saved for later.
  - To edit an in-process change order:
    - Navigate to the relevant **Purchase Order** and select the **Version History** tab**.**
    - Locate the **Pending Changes** section and open the Change Order.
    - Select the related actions (…) button next to the **Version Number.**
    - Hover over **Purchase Order Change** and select **Edit.**
    - Revise the change order process as necessary.

Process for Submitting a Change Order - Attachment:

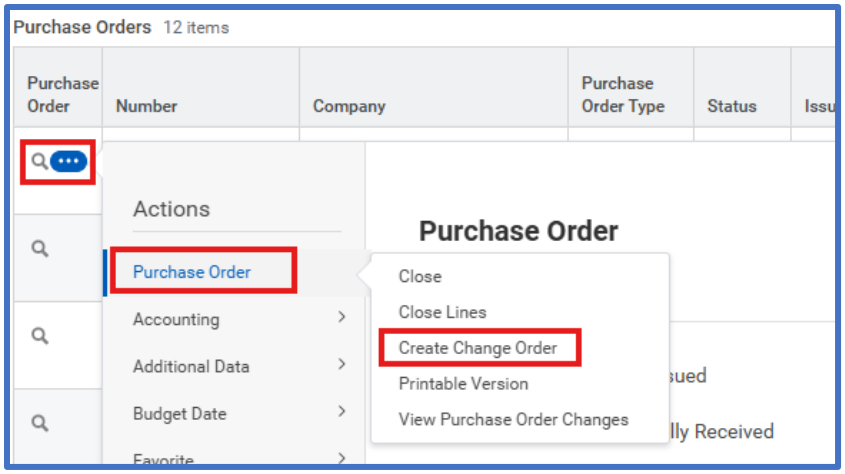
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Attachment**.
   (***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. Scroll down the page and select the Attachments tab.
8. To provide an **Attachment**, select **Upload** and follow your device instructions.
   a. To select an **Attachment Category,** select the menu icon, and then make your selection.
   b. To include the attachment on the resulting Purchase Order for the Supplier to view, select the **External** checkbox.
   (**Note:** *To attach more documents, select* ***Upload.*** *To remove an attachment, select the trash can icon.*
9. Select **Submit** to finalize the change order.

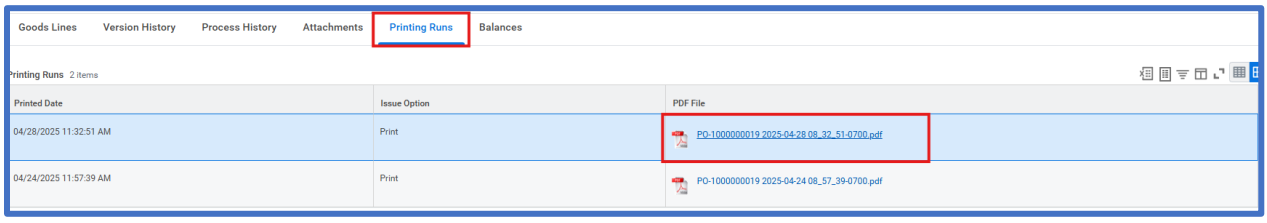
Approval Process

Once submitted, the change order follows an approval workflow

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Issued** status with a **Version Number.**

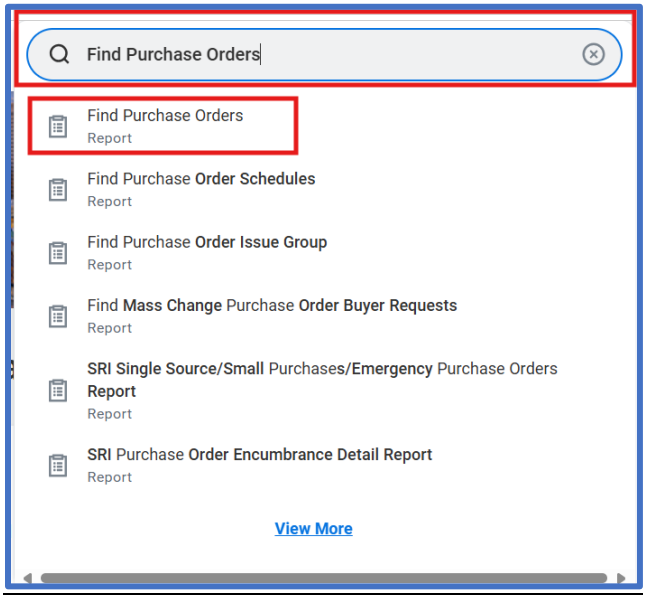
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



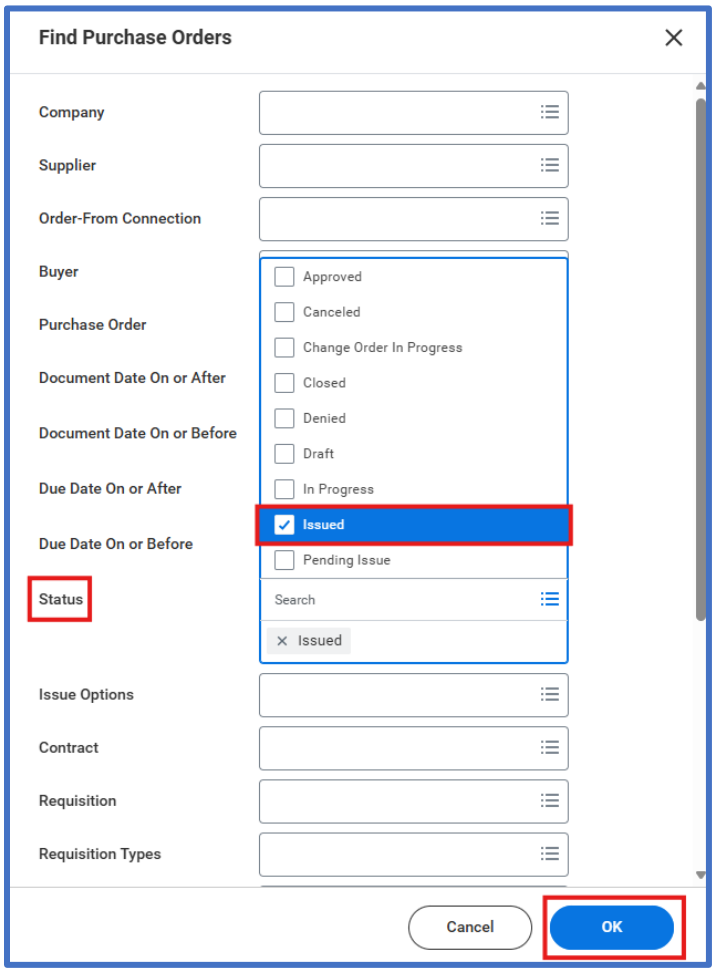
Process for Submitting a Change Order – Cancel Line:

(***Note:*** *You cannot cancel a line which has already been received or invoiced.)*

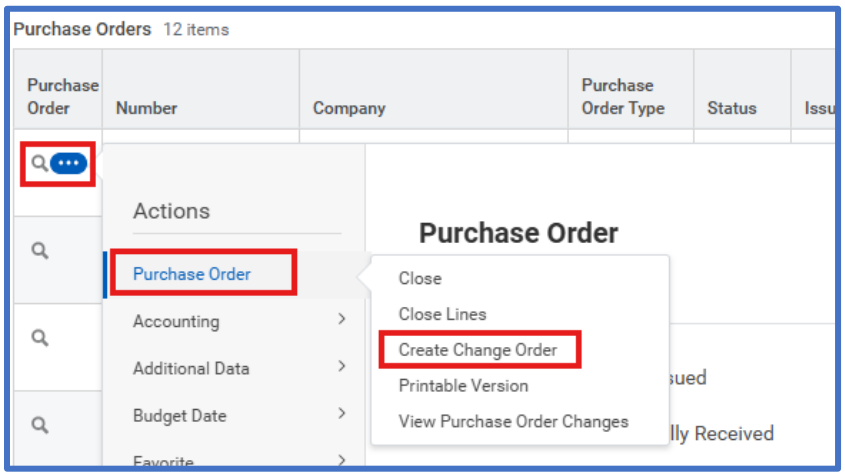
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



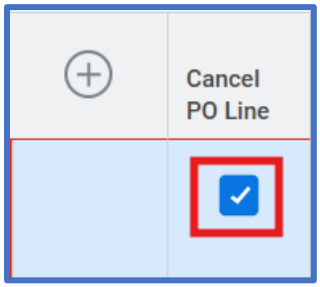
2. Filter the **Status** field to **Issued** and select **OK.**



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**'.



5. Use the menu icon in the **Reason** field to select **Cancel Line**.
   (***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. Scroll down the page and select the Goods Lines or Services Lines tab.
8. Select the checkbox under the heading **Cancel PO Line** for the line you need to cancel.



9. To provide an **Attachment**, select the **Attachments** tab, select **Upload,** and follow your device instructions.
   a. To select an **Attachment Category,** select the menu icon, and then make your selection.
   b. To include the attachment on the resulting Purchase Order for the Supplier to view, select the **External** checkbox.

   (**Note:** *To attach more documents, select* ***Upload.*** *To remove an attachment, select the trash can icon.*
10. Select **Submit** to finalize the change order.

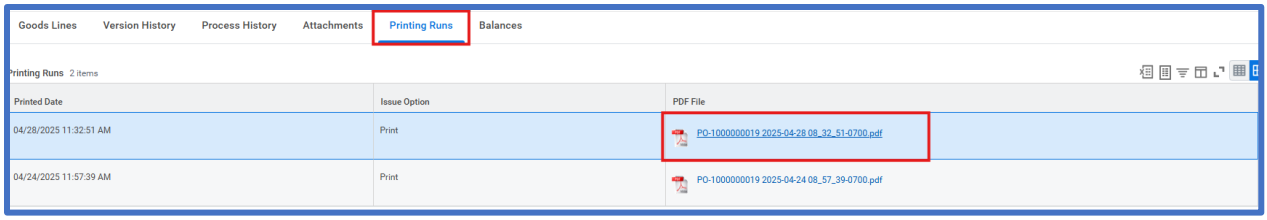
Approval Process

Once submitted, the change order follows an approval workflow.

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Issued** status with a **Version Number.**

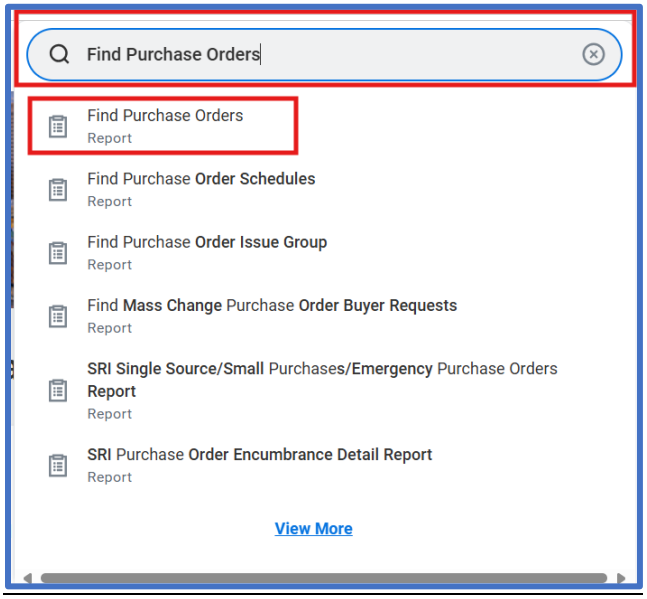
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.


Goods Lines
Version History
Process History
Attachments
Printing Runs
Balances
Printing Runs 2 items
Printed Date
Issue Option
PDF File
04/28/2025 11:32:51 AM
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

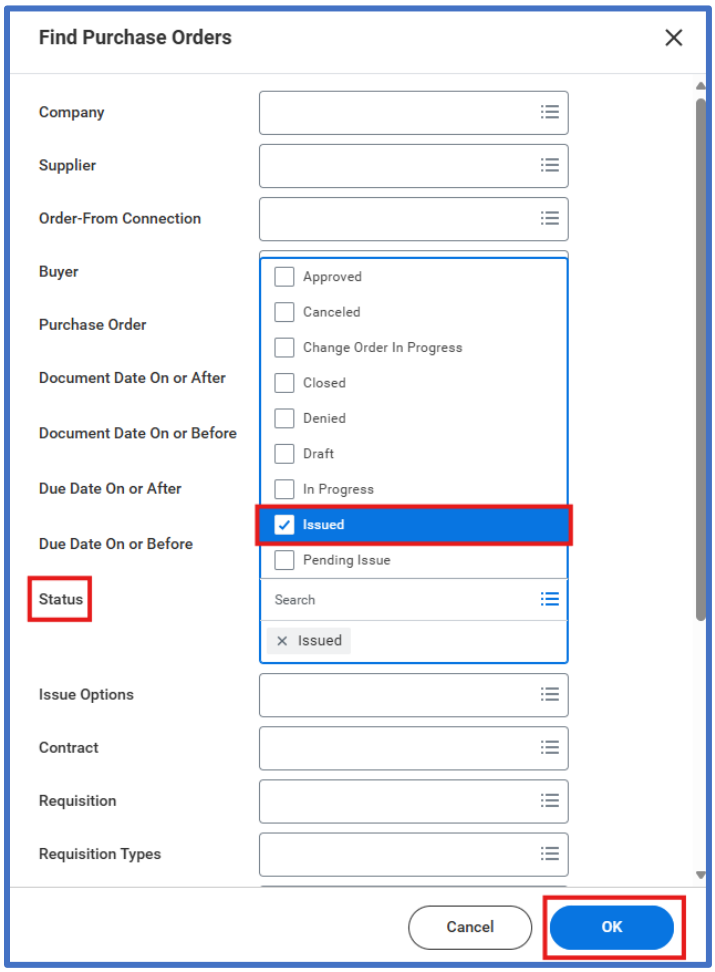
Process for Submitting a Change Order – Cancel PO:

(***Note:*** *You cannot cancel a Purchase Order which has already been received or invoiced.)*

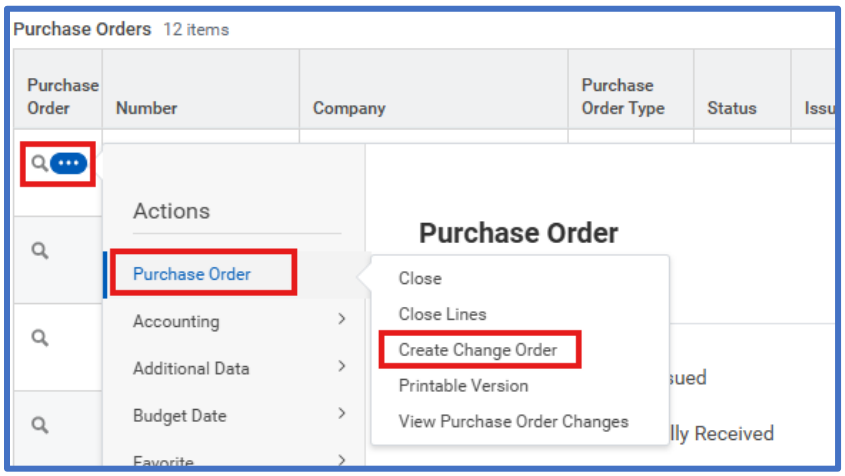
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Cancel PO**.
   (***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. Select **Submit** to finalize the change order.

Approval Process

Once submitted, the change order follows an approval workflow. The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.
(**Note:** *If the PO is a release PO (Buyer Autocreate) you must reach out to the Buyer of the Supplier Contract to manually cancel the PO.)*

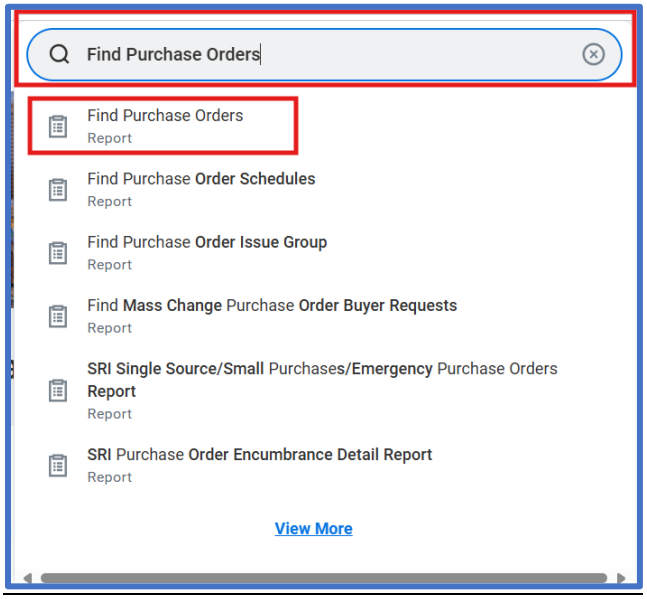
Agency Requisitioner Confirmation:

The Purchase Order will now reflect **Canceled** status.

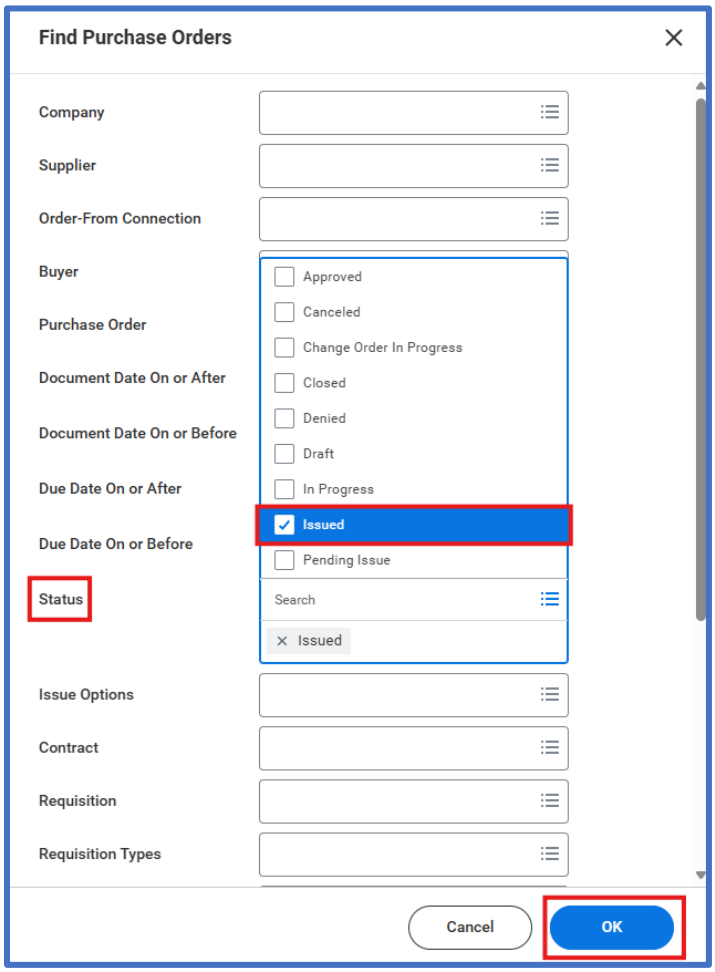
Process for Submitting a Change Order – Lines (Add/Delete/Price/Description/Worktags):

(***Note:*** *You cannot make edits to a line which has already been received or invoiced.)*

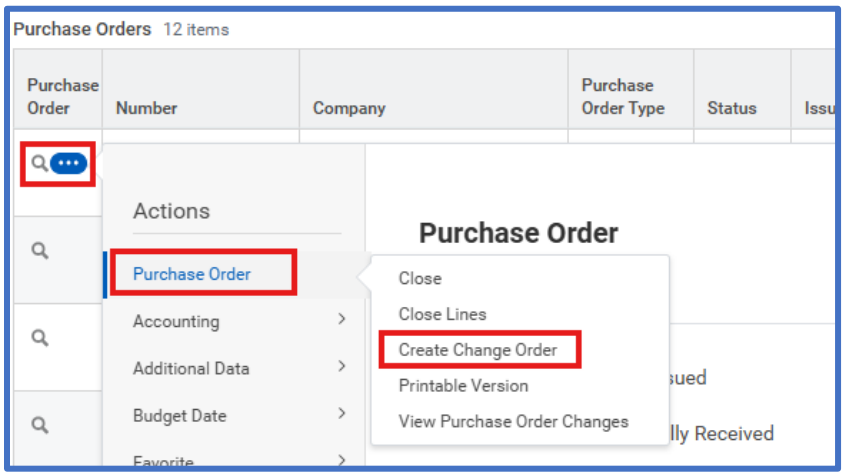
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Lines (Add/Delete/Price/Description/Worktags)**. (***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. Scroll down the page and select the Goods Lines or Services Lines tab.
8. Using the horizontal scroll bar, edit fields as necessary or to add additional lines, select the (+) icon.
9. To provide an **Attachment**, select the **Attachments** tab, select **Upload,** and follow your device instructions.
    a. To select an **Attachment Category,** select the menu icon, and then make your selection.
    b. To include the attachment on the resulting Purchase Order for the Supplier to view, select the **External** checkbox.

    (**Note:** *To attach more documents, select* ***Upload.*** *To remove an attachment, select the trash can icon.*
10. Select **Submit** to finalize the change order.

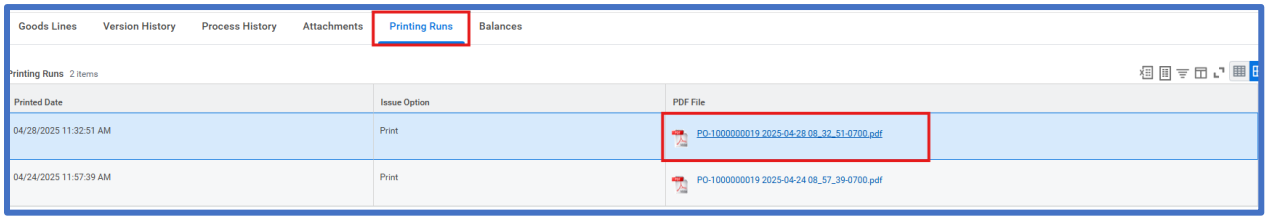
Approval Process

Once submitted, the change order follows an approval workflow.

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Issued** status with a **Version Number.**

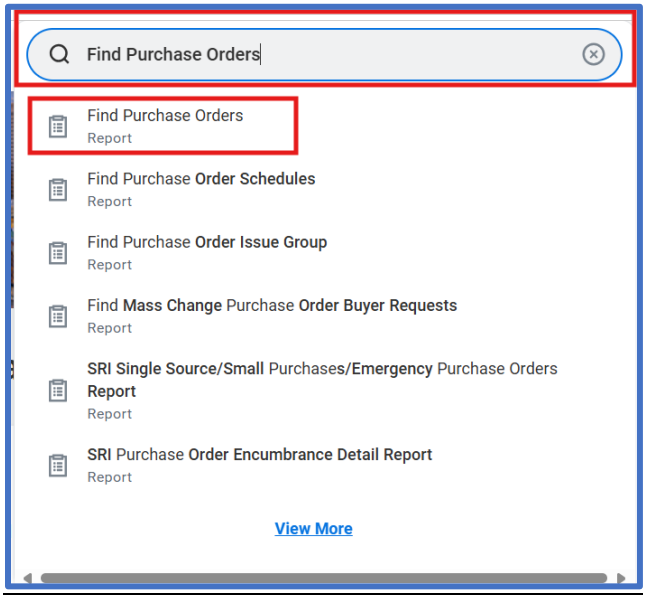
- To view the Issued Purchase Order:
    - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



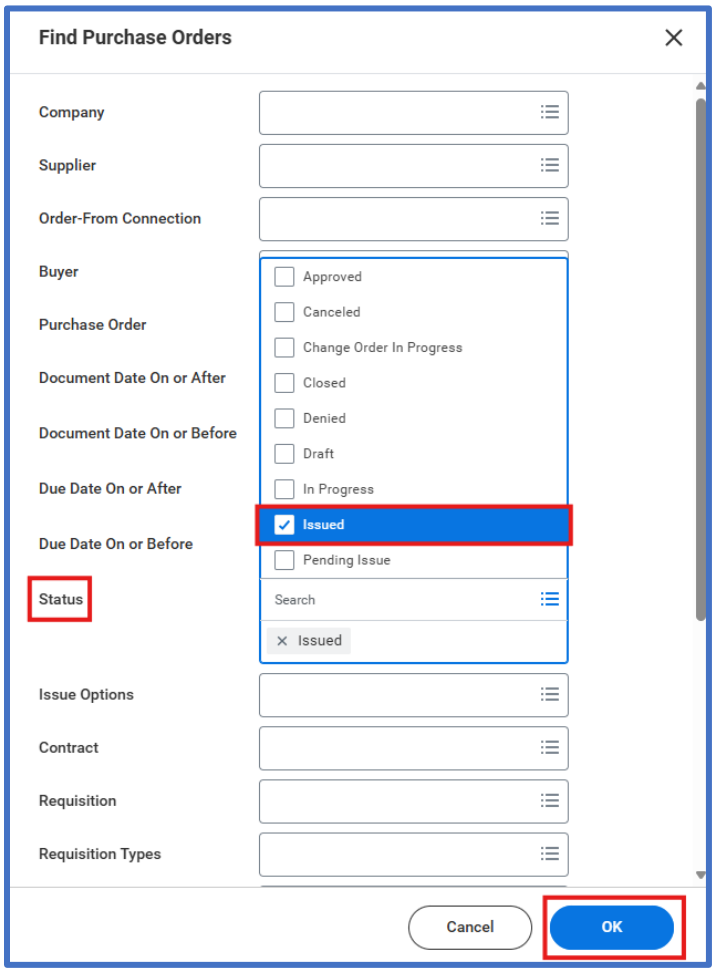
Process for Submitting a Change Order – Order-From Connection (Site Code)

(***Note:*** *You cannot make edits to a line which has already been received or invoiced.)*

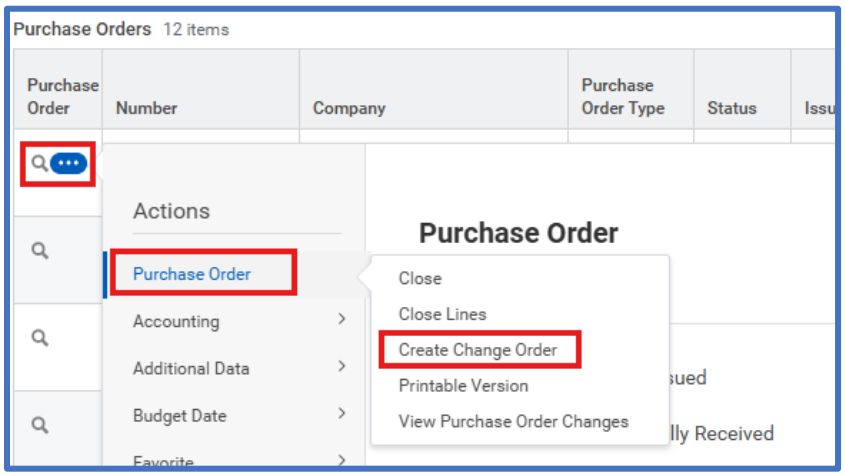
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Order-From Connection (Site Code)**.
   (***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. Scroll down the page to the heading **Summary**.
8. Use the **Order-From Connection** field to select the Order-From Connection (Site Code).
9. Select **Submit** to finalize the change order.

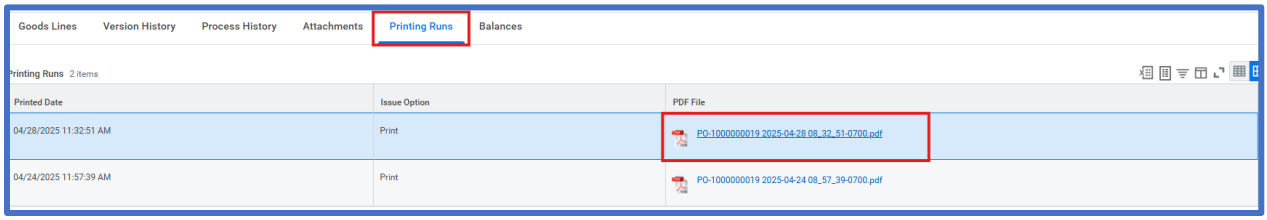
Approval Process

Once submitted, the change order follows an approval workflow.

Agency Requisitioner Confirmation:

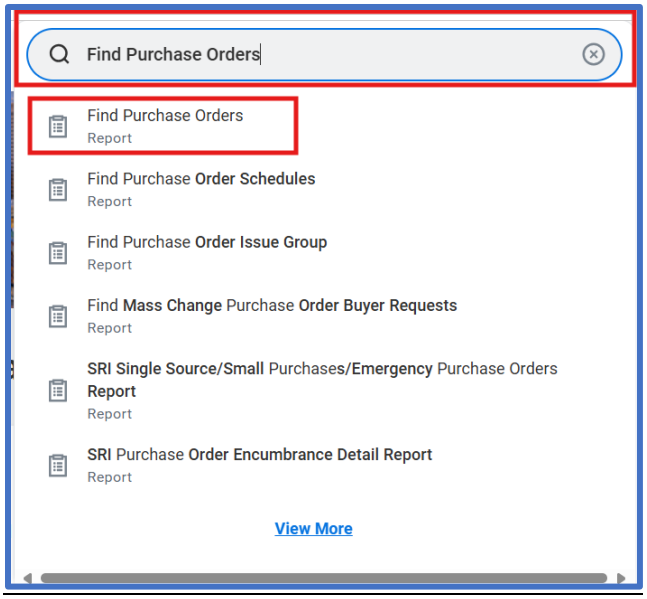
- The Purchase Order will now reflect **Issued** status with a **Version Number.**

- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

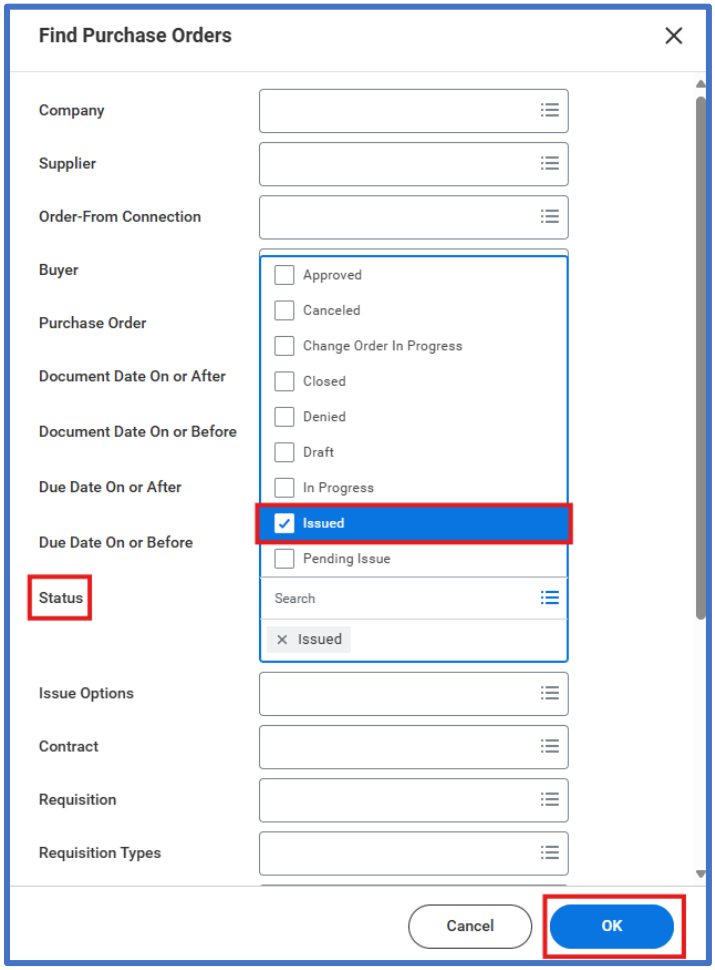


Process for Submitting a Change Order - Attachment:

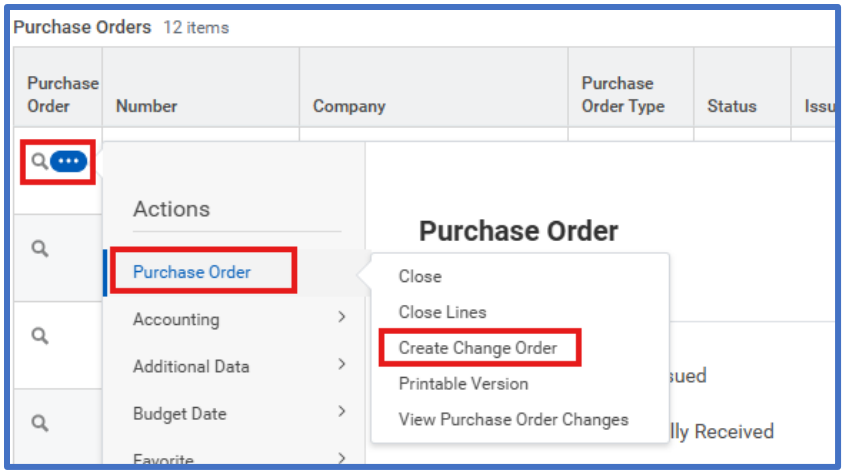
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Attachment**.
   (***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. Scroll down the page and select the Attachments tab.
8. To provide an **Attachment**, select **Upload** and follow your device instructions.
   a. To select an **Attachment Category,** select the menu icon, and then make your selection.
   b. To include the attachment on the resulting Purchase Order for the Supplier to view, select the **External** checkbox.
   (**Note:** *To attach more documents, select* ***Upload.*** *To remove an attachment, select the trash can icon.*
9. Select **Submit** to finalize the change order.

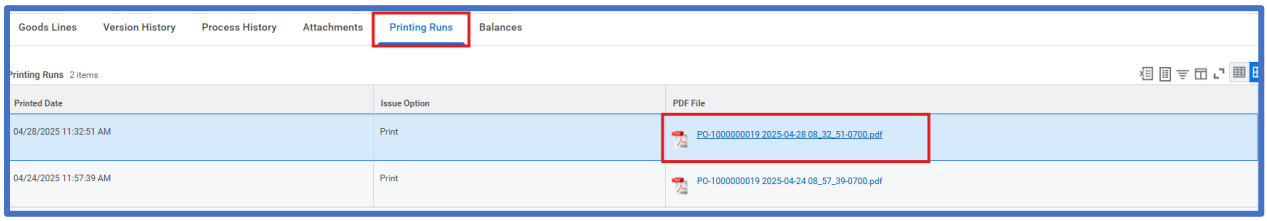
Approval Process

Once submitted, the change order follows an approval workflow

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Issued** status with a **Version Number.**

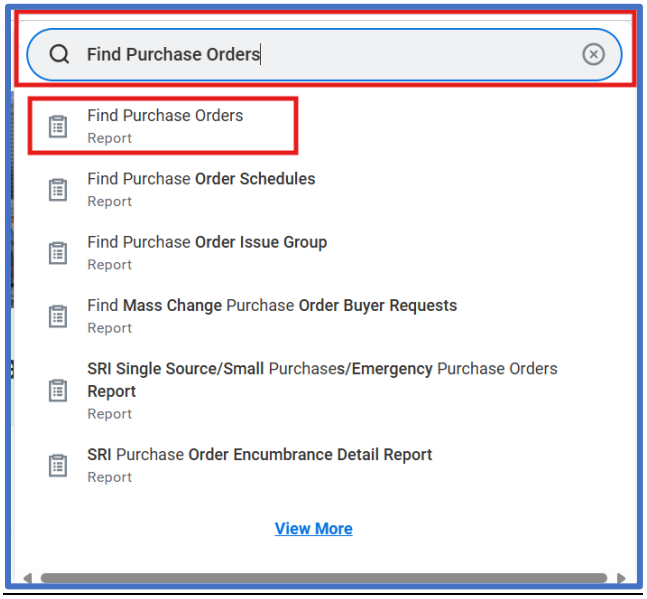
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



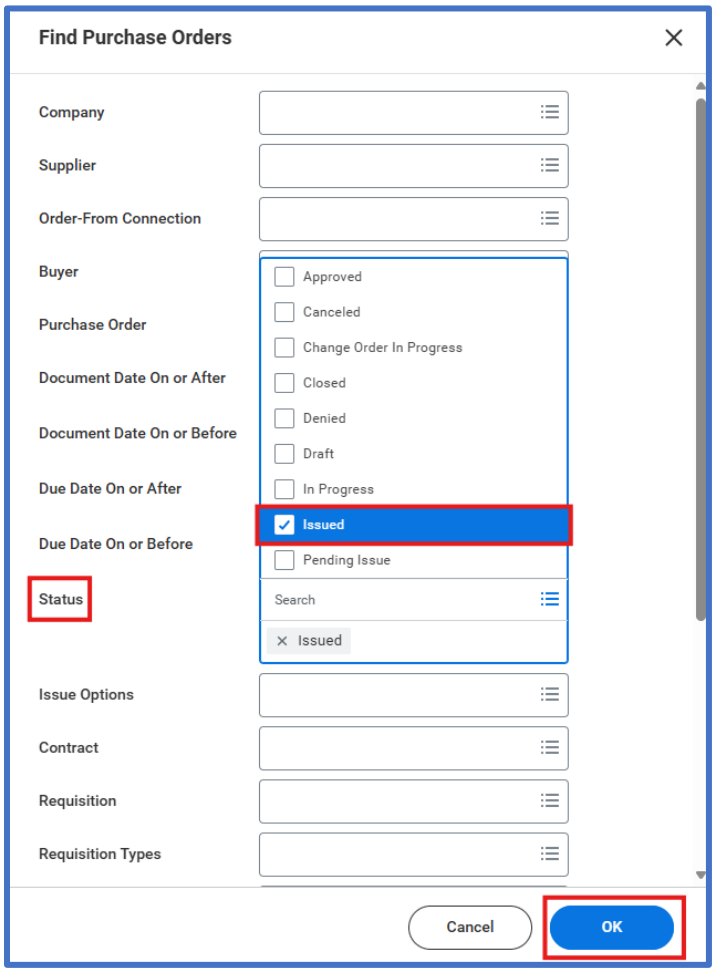
Change Orders with Split Lines – Option 1: Correcting Split Lines:

(***Note:*** *This option is best if you need to correct the splits on a single line.)*

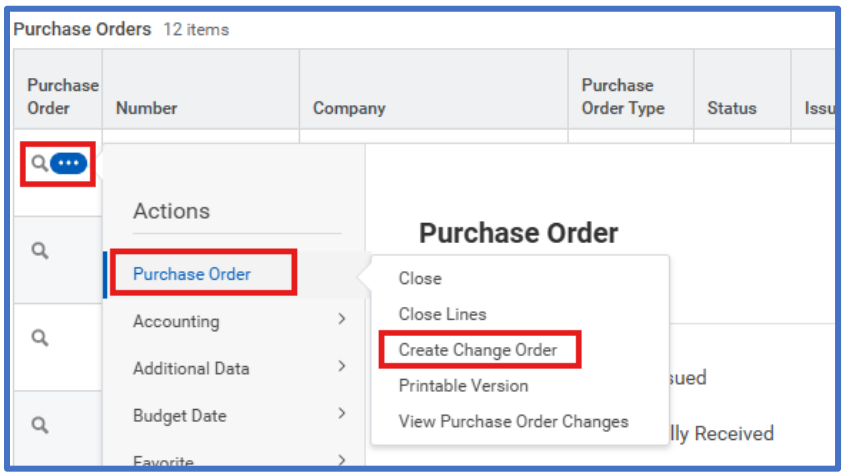
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Lines (Add/Delete/Price/Description/Worktags)**.
   (***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. Scroll down the page and select the Goods Lines or Services Lines tab.
8. Navigate to the PO line containing the splits you wish to remove.
9. If you need to re-add a new line with correct splits, add a new PO line and enter the correct split allocation details.
   (**Note:** *This must be done before canceling or reducing the original split line.)*
10. Instead of editing the split lines, change the total **Unit Cost** or **Extended Amount** of the PO line to zero.
    a. This action will automatically remove the associated split lines.
11. Alternatively, if the line has been received or invoiced against, you will need to reduce the line to what was received/invoiced.
12. To provide an **Attachment,** select the **Attachments** tab, select **Upload,** and follow your device instructions.
    a. To select an **Attachment Category,** select the menu icon, and then make your selection.
    b. To include the attachment on the resulting Purchase Order for the Supplier to view, select the **External** checkbox.
    (**Note:** *To attach more documents, select* ***Upload.*** *To remove an attachment, select the trash can icon.*
13. Select **Submit** to finalize the change order.

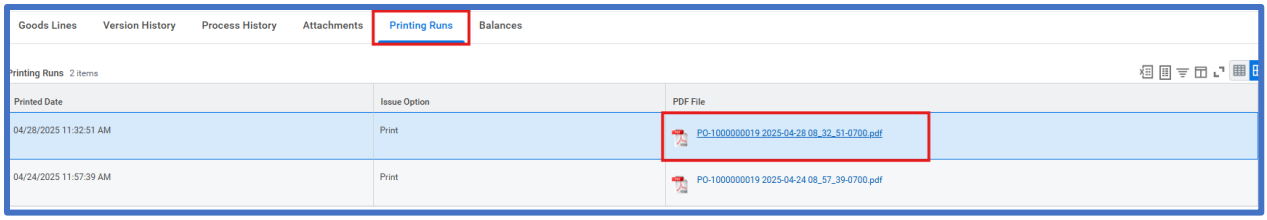
Approval Process

Once submitted, the change order follows an approval workflow.

Agency Requisitioner Confirmation:

- The Purchase Order will now reflect **Issued** status with a **Version Number.**

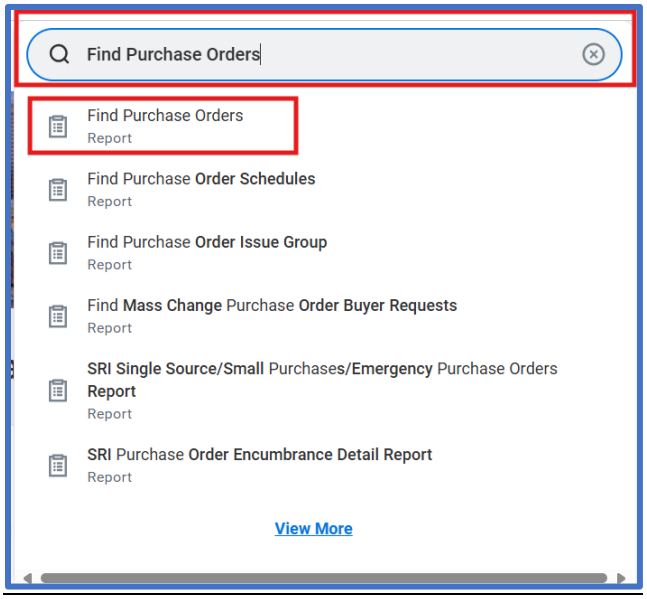
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.


Goods Lines
Version History
Process History
Attachments
Printing Runs
Balances
Printing Runs 2 items
Printed Date
Issue Option
PDF File
04/28/2025 11:32:51 AM
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

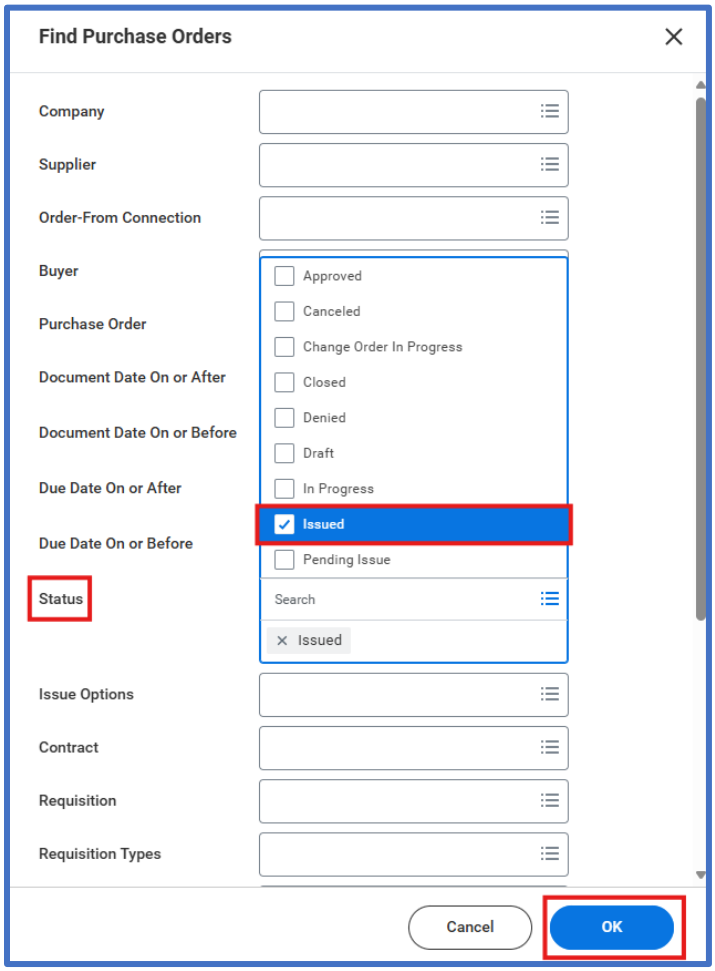
Change Orders with Split Lines – Option 2: Cancel the Purchase Order or Purchase Order Lines:

(***Note:*** *This option is useful if the entire PO or several lines are incorrect and need to be re-sourced.)*

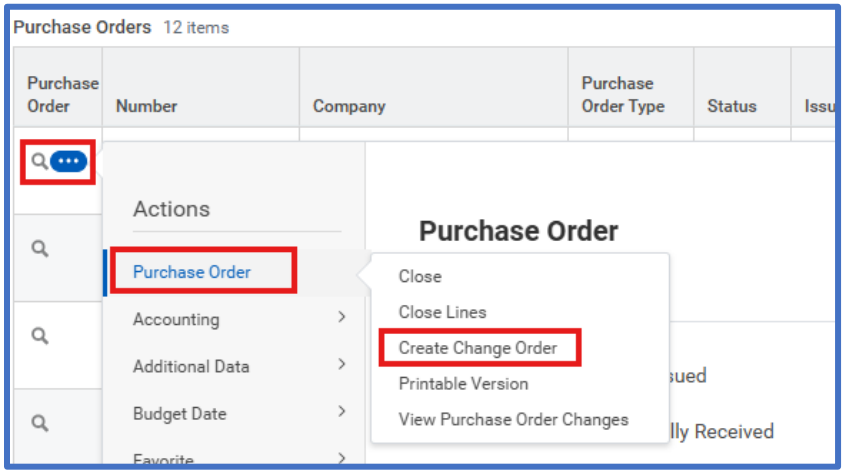
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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



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**'.



5. Use the menu icon in the **Reason** field to select **Cancel PO**.
   (***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. If you wish to cancel the PO line:
   a. Navigate to the Goods or Service Line
   b. Select the checkbox under the Cancel column
8. Select **Submit** to finalize the change order.

Approval Process

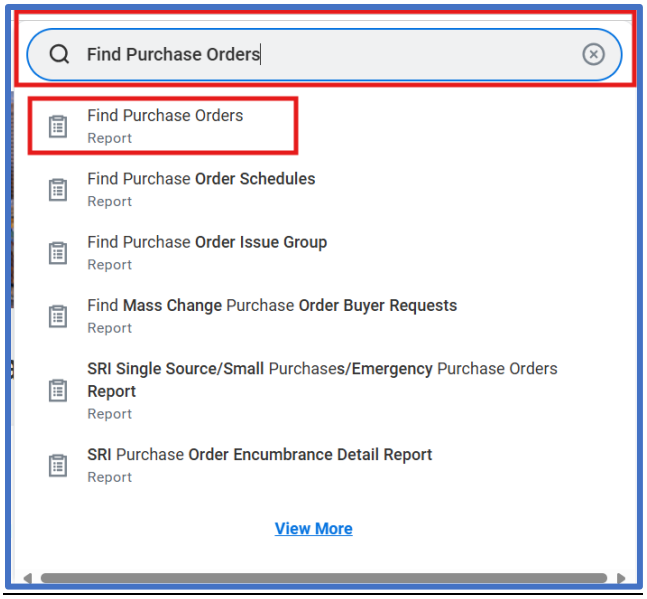
Once submitted, the change order follows an approval workflow. The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.
(**Note:** *If the PO is a release PO (Buyer Autocreate) you must reach out to the Buyer of the Supplier Contract to manually cancel the PO.)*

Agency Requisitioner Confirmation and Next Steps:

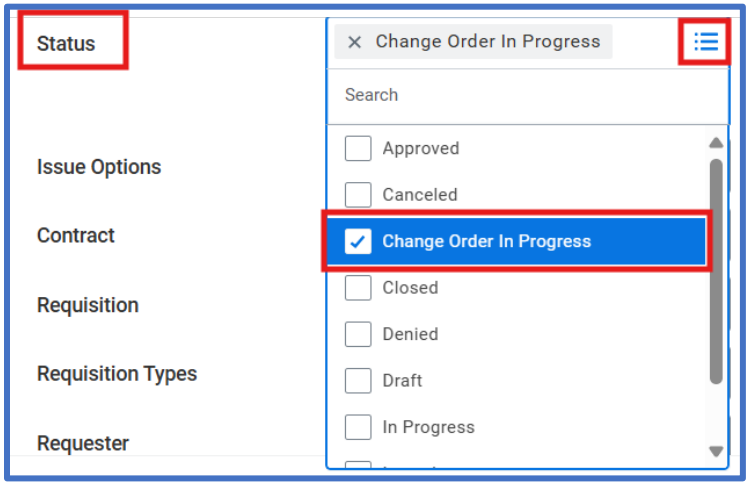
1. The Purchase Order will now reflect **Canceled** status.
2. Submit a new requisition, editing the line splits to reflect the correct allocations.

Process for viewing the Process History for a Change Order:

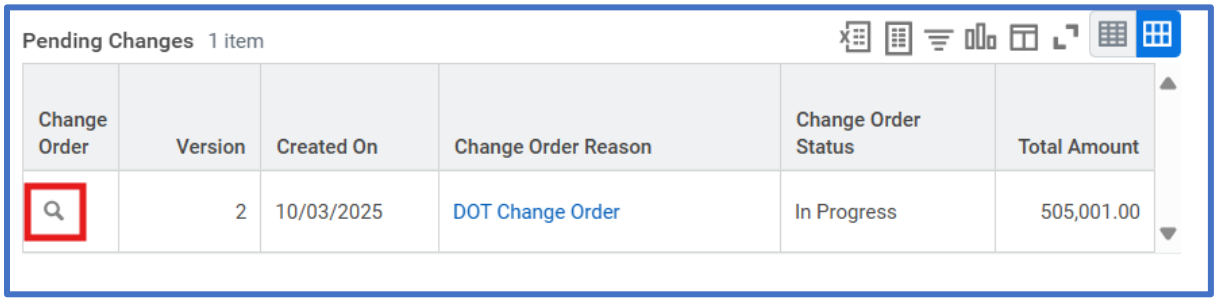
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



2. Filter the **Status** field to **Change Order in Progress** and select **OK.**



3. Locate the **Purchase Order** you are initiating a Change Order on and select the magnifying glass icon to open the Purchase Order.
4. Scroll down the page and select the **Version History** tab.
5. Select the magnifying glass icon under the heading **Pending Changes – Change Order** to open the Change Order in progress.



6. Scroll down the page and select the **Process History** tab to view where the Change Order is in the approval process.