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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:

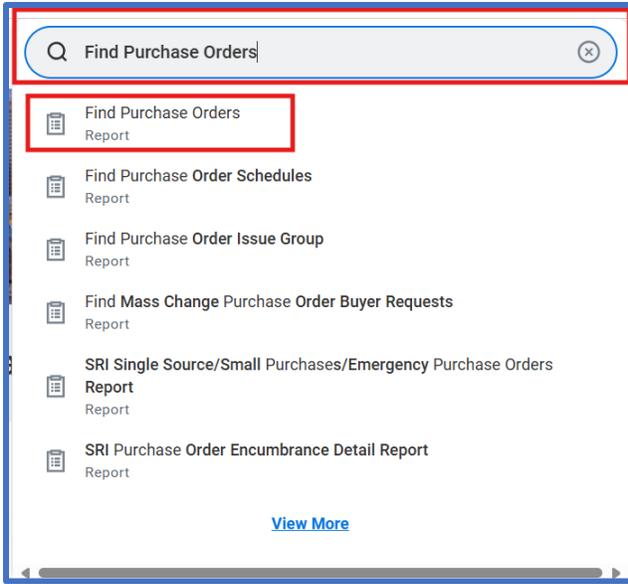
- Change orders **cannot** be initiated on a Purchase Order that are **In Process** or **Approved**. The Purchase Order must have an **Issued** status to proceed. It is recommended to filter Purchase Orders to 'Issued' status for easy identification.
- **Closing** a Purchase Order will release the encumbered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

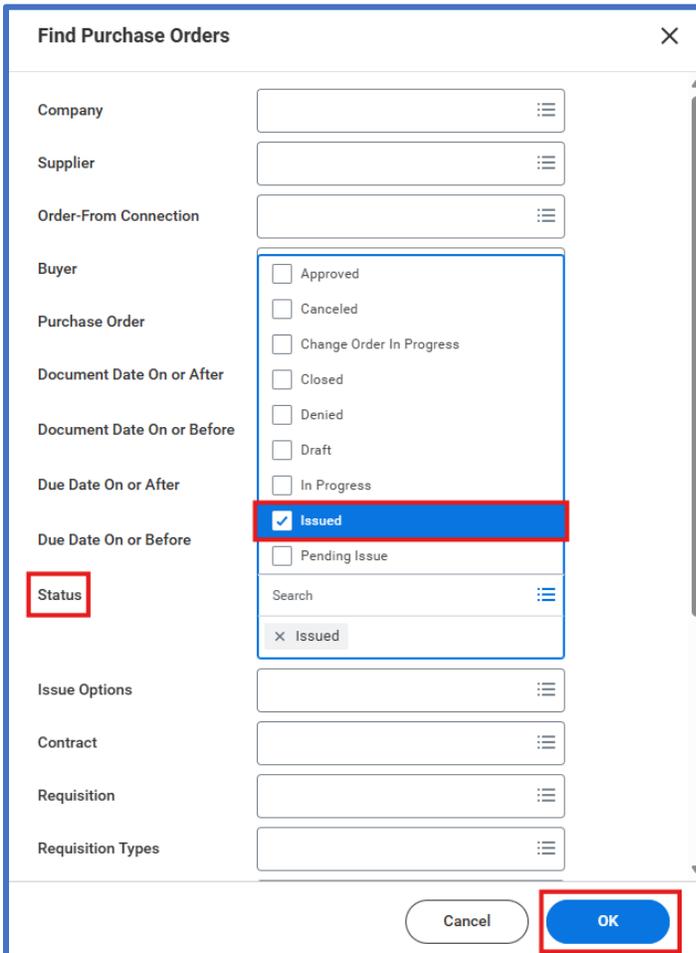
- The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.  
(**Note:** If the PO is a release PO (Buyer Auto Create) you must reach out to the Buyer of the Supplier Contract to manually cancel 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:

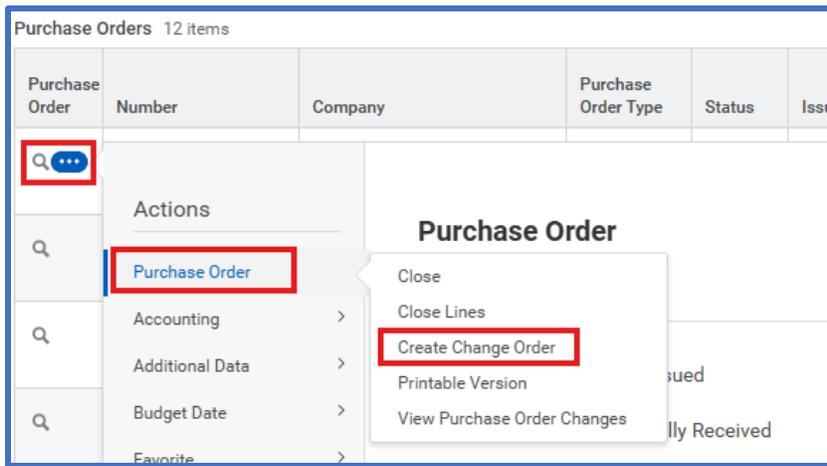
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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**'.



- 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.*)
- Enter additional details to support the requested change in the **Comments** field.
- Scroll down the page and select the Attachments tab.
- To provide an **Attachment**, select **Upload** and follow your device instructions.
  - To select an **Attachment Category**, select the menu icon, and then make your selection.
  - 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.*)
- 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**.



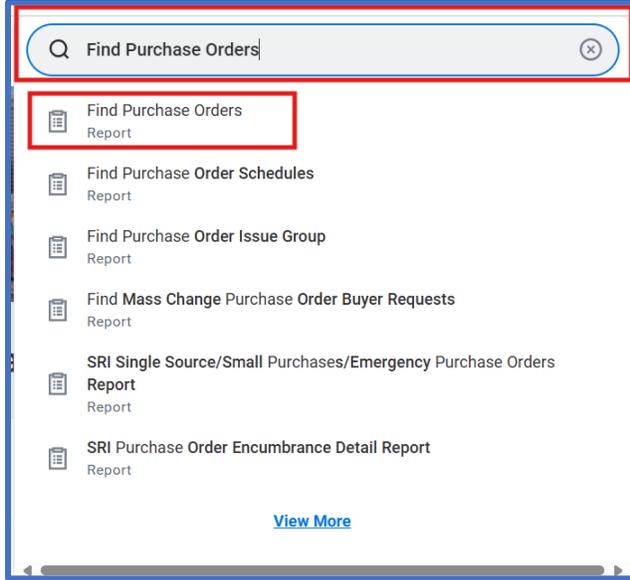
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

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 Line:

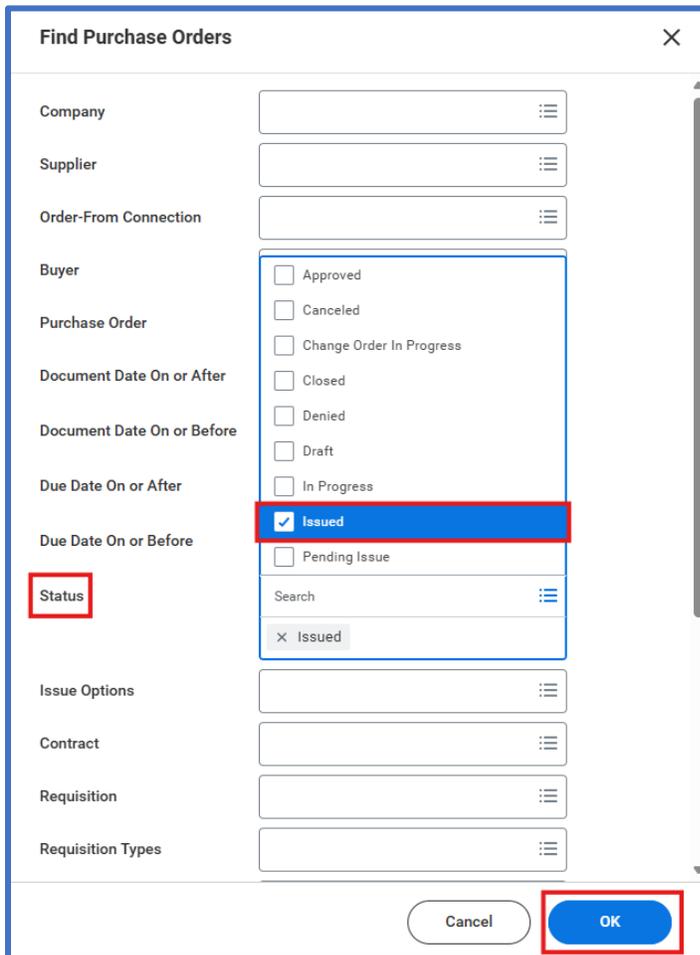
(**Note:** You cannot cancel a line which has already been received or invoiced.)

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



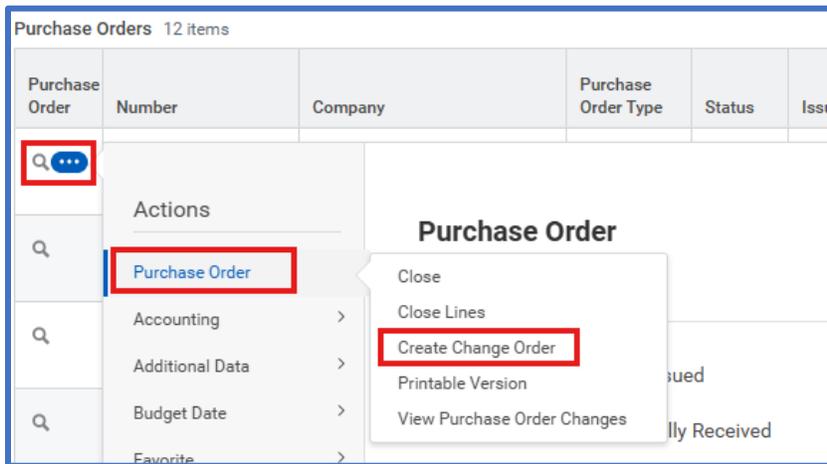
A screenshot of the Workday search bar. The search bar contains the text "Find Purchase Orders" and a clear button (X). Below the search bar, a list of search results is displayed, each with a calendar icon and the text "Report". The first result, "Find Purchase Orders Report", is highlighted with a red box. Other results include "Find Purchase Order Schedules Report", "Find Purchase Order Issue Group Report", "Find Mass Change Purchase Order Buyer Requests Report", "SRI Single Source/Small Purchases/Emergency Purchase Orders Report", and "SRI Purchase Order Encumbrance Detail Report". A "View More" link is located at the bottom of the list.

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

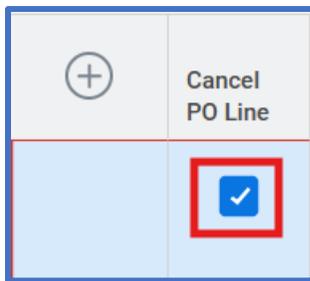


A screenshot of the "Find Purchase Orders" filter dialog box. The dialog box has a title bar with "Find Purchase Orders" and a close button (X). The main area contains several filter fields: "Company", "Supplier", "Order-From Connection", "Buyer", "Purchase Order", "Document Date On or After", "Document Date On or Before", "Due Date On or After", "Due Date On or Before", "Status", "Issue Options", "Contract", "Requisition", and "Requisition Types". Each field has a dropdown menu icon. The "Status" field is highlighted with a red box, and its dropdown menu is open, showing a list of status options: "Approved", "Canceled", "Change Order In Progress", "Closed", "Denied", "Draft", "In Progress", "Issued", and "Pending Issue". The "Issued" option is checked and highlighted with a blue box. Below the dropdown menu, there is a search field and a list of selected items, including "Issued". At the bottom of the dialog box, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

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**.



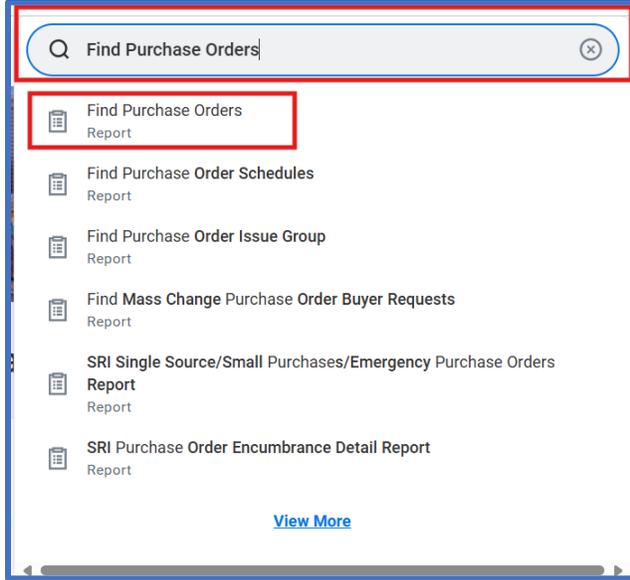
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

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	PG-1000000019 2025-04-28 08_32_51-0700.pdf			
04/24/2025 11:57:39 AM	Print	PG-1000000019 2025-04-24 08_57_39-0700.pdf			

## Process for Submitting a Change Order – Cancel PO:

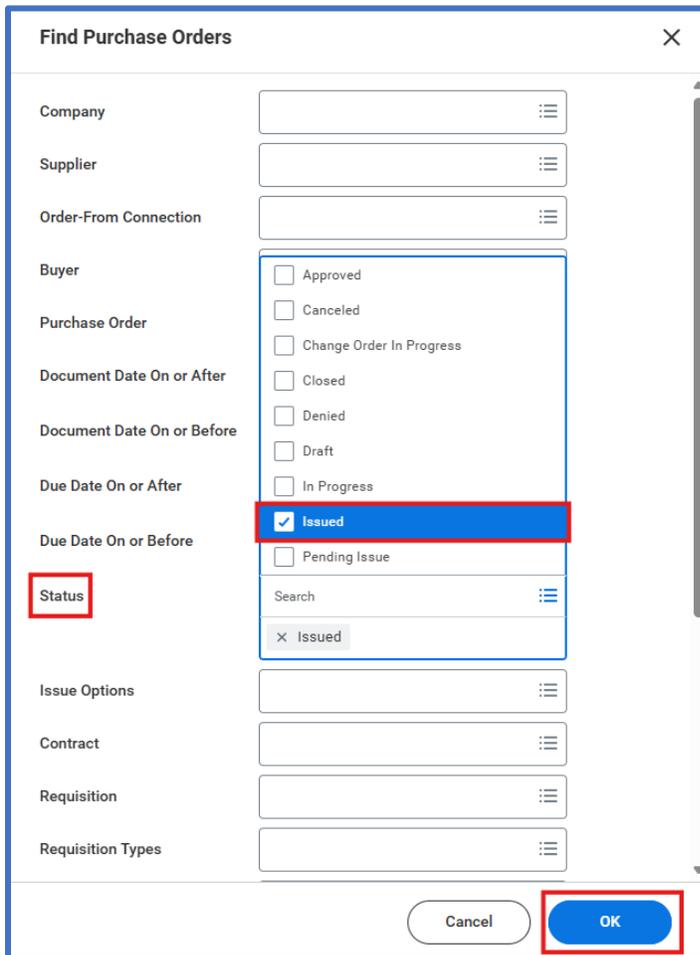
(**Note:** You cannot cancel a Purchase Order which has already been received or invoiced.)

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



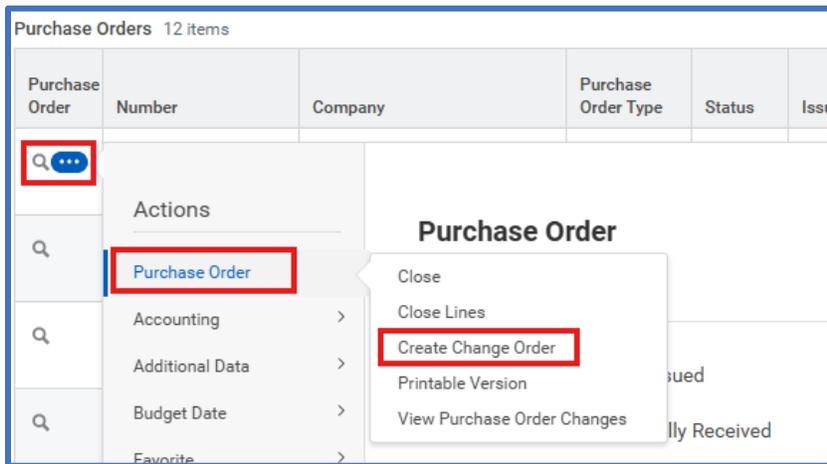
A screenshot of the Workday search bar. The search bar contains the text "Find Purchase Orders" and a clear button (X). Below the search bar, a list of search results is displayed, each with a calendar icon and the text "Report". The first result, "Find Purchase Orders Report", is highlighted with a red box. Other results include "Find Purchase Order Schedules Report", "Find Purchase Order Issue Group Report", "Find Mass Change Purchase Order Buyer Requests Report", "SRI Single Source/Small Purchases/Emergency Purchase Orders Report", and "SRI Purchase Order Encumbrance Detail Report". A "View More" link is located at the bottom of the list.

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



A screenshot of the "Find Purchase Orders" filter dialog box. The dialog box has a title bar with "Find Purchase Orders" and a close button (X). It contains several filter fields: "Company", "Supplier", "Order-From Connection", "Buyer", "Purchase Order", "Document Date On or After", "Document Date On or Before", "Due Date On or After", "Due Date On or Before", "Status", "Issue Options", "Contract", "Requisition", and "Requisition Types". The "Status" field is highlighted with a red box. The "Status" dropdown menu is open, showing a list of status options: "Approved", "Canceled", "Change Order In Progress", "Closed", "Denied", "Draft", "In Progress", "Issued", and "Pending Issue". The "Issued" option is checked and highlighted with a blue box. Below the dropdown menu, there is a search field and a list of selected items, including "Issued". At the bottom of the dialog box, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

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.)

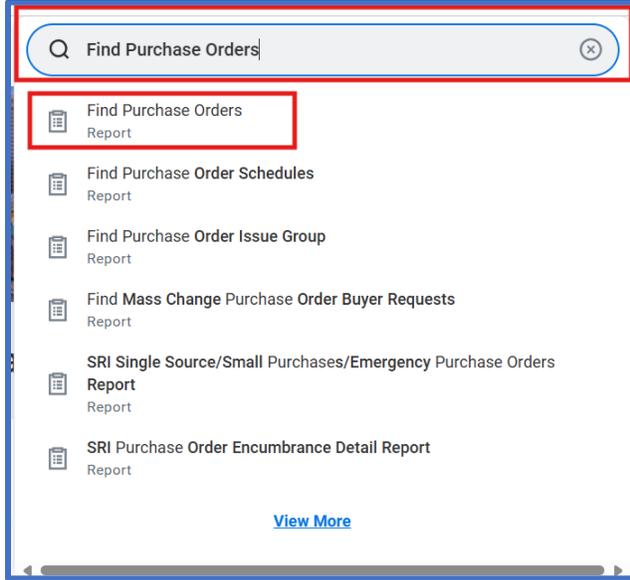
#### Agency Requisitioner Confirmation:

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

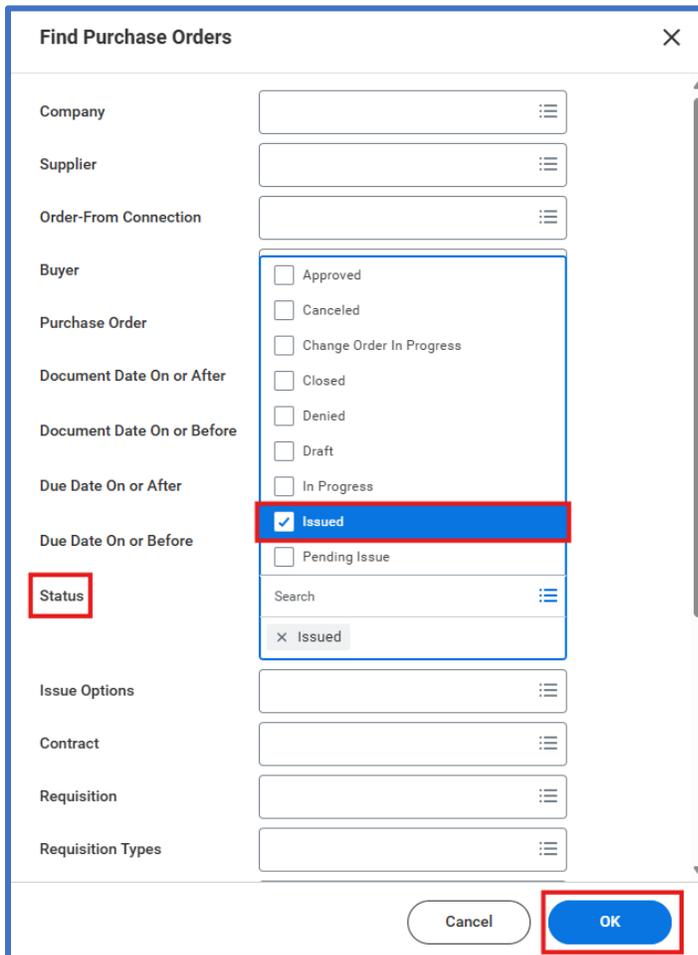
# Process for Submitting a Change Order – Lines (Add/Delete/Price/Description/Worktags):

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

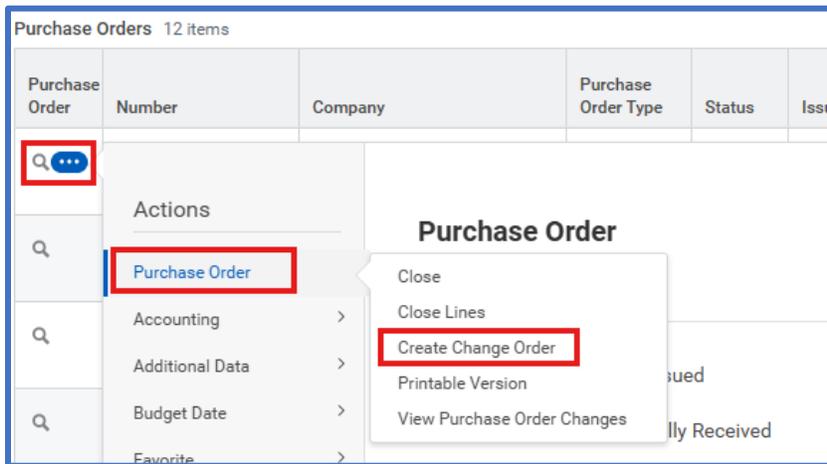
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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**'.



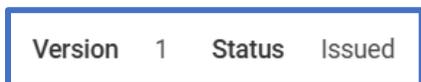
5. Use the menu icon in the **Reason** field to select **Lines (Add/Delete/Price/Description/Worktags)**.  
(*Note: This is a one-option field – enter additional reason/justification in the **Comments** field.*)
6. Enter additional details to support the requested change in the **Comments** field.
7. 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

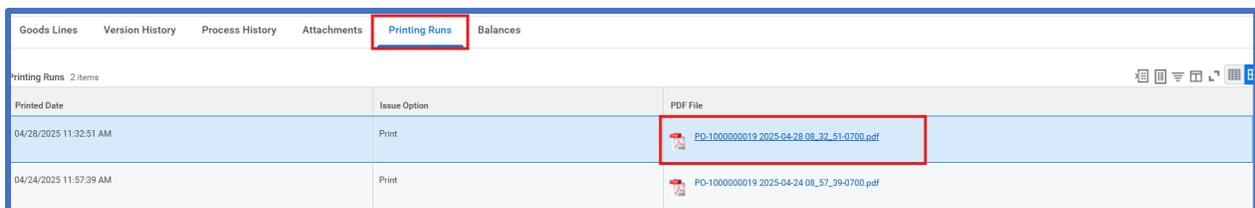
Once submitted, the change order follows an approval workflow.

### Agency Requisitioner Confirmation:

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



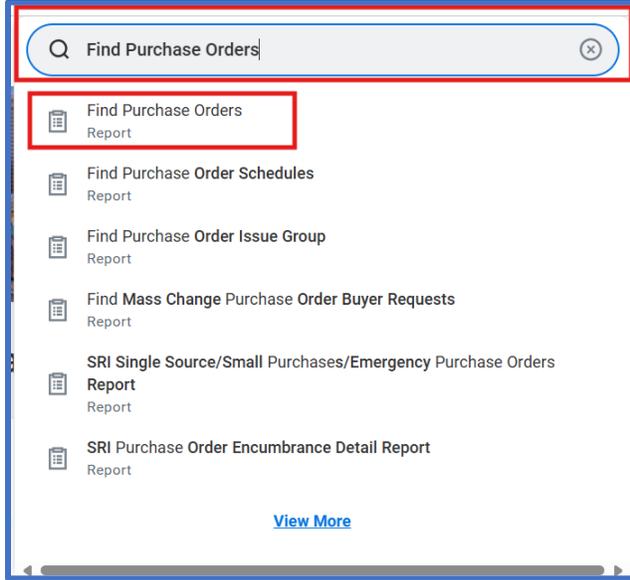
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



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

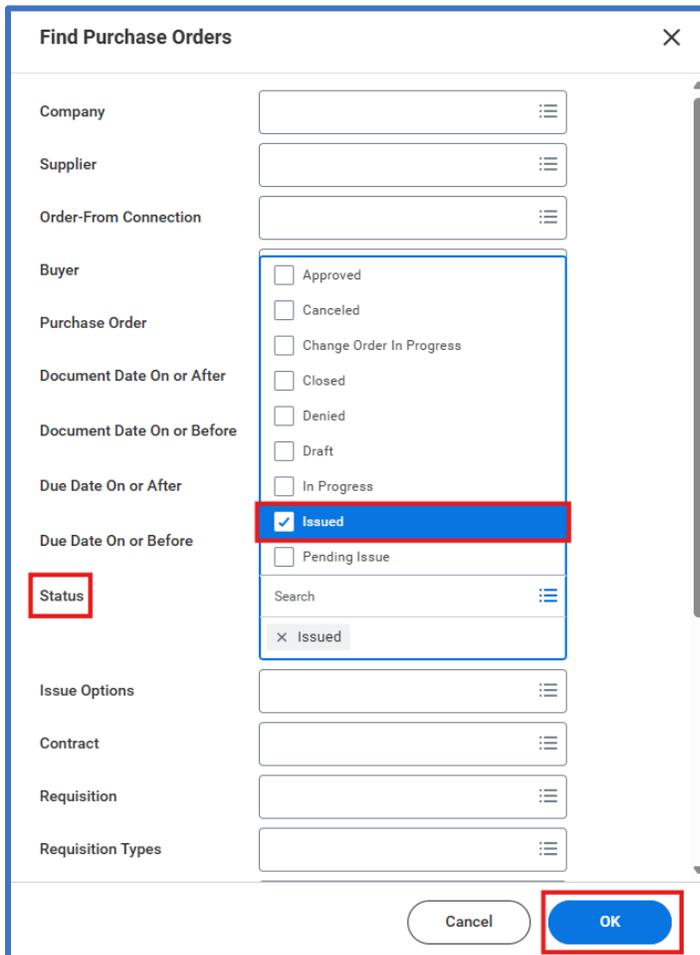
(**Note:** You cannot make edits to a line which has already been received or invoiced.)

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



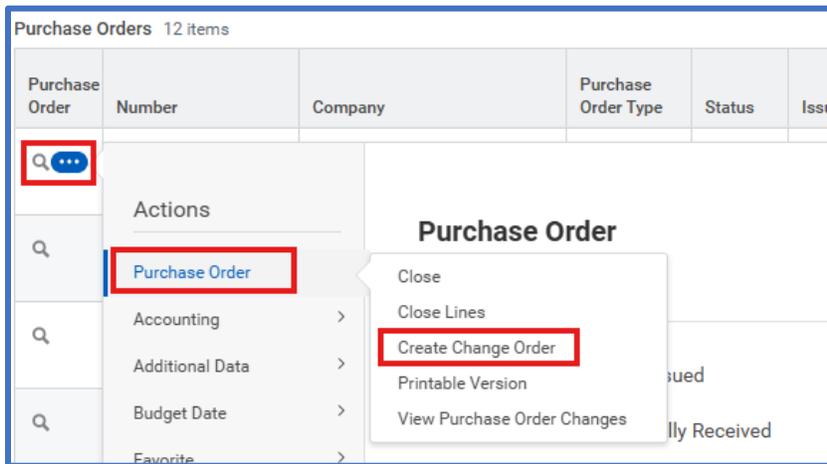
A screenshot of the Workday search bar. The search bar contains the text "Find Purchase Orders" and a magnifying glass icon on the left and a close icon on the right. Below the search bar, a list of search results is displayed, each with a calendar icon and the text "Report". The first result, "Find Purchase Orders Report", is highlighted with a red box. Other results include "Find Purchase Order Schedules Report", "Find Purchase Order Issue Group Report", "Find Mass Change Purchase Order Buyer Requests Report", "SRI Single Source/Small Purchases/Emergency Purchase Orders Report", and "SRI Purchase Order Encumbrance Detail Report". A "View More" link is located at the bottom of the list.

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



A screenshot of the "Find Purchase Orders" filter dialog box. The dialog box has a title bar with "Find Purchase Orders" and a close button (X). It contains several filter fields: "Company", "Supplier", "Order-From Connection", "Buyer", "Purchase Order", "Document Date On or After", "Document Date On or Before", "Due Date On or After", "Due Date On or Before", "Status", "Issue Options", "Contract", "Requisition", and "Requisition Types". Each field has a dropdown menu icon. The "Status" field is highlighted with a red box. The "Status" dropdown menu is open, showing a list of status options: "Approved", "Canceled", "Change Order In Progress", "Closed", "Denied", "Draft", "In Progress", "Issued", and "Pending Issue". The "Issued" option is checked and highlighted with a blue box. Below the dropdown menu, there is a search field and a list of selected items, including "Issued". At the bottom of the dialog box, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

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**'.



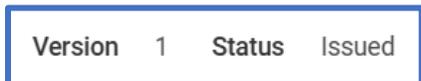
5. Use the menu icon in the **Reason** field to select **Order-From Connection (Site Code)**.  
(*Note: This is a one-option field – enter additional reason/justification in the **Comments** field.*)
6. Enter additional details to support the requested change in the **Comments** field.
7. Scroll down 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

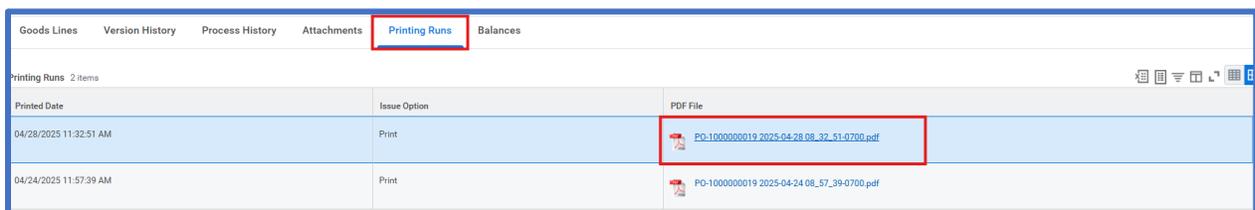
Once submitted, the change order follows an approval workflow.

### Agency Requisitioner Confirmation:

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

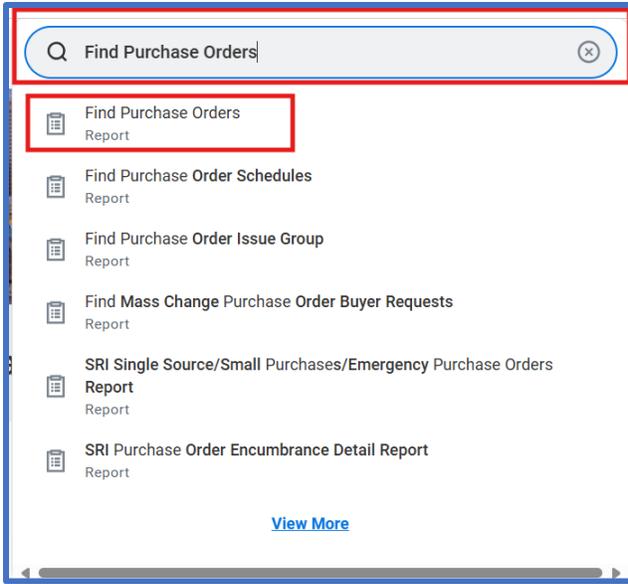


- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

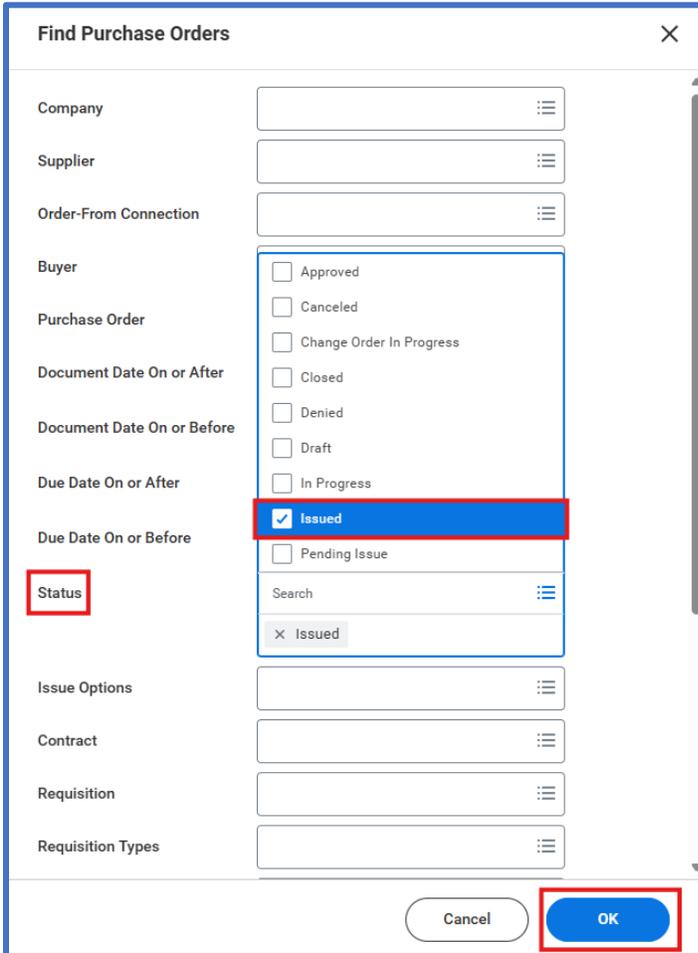


## Process for Submitting a Change Order - Attachment:

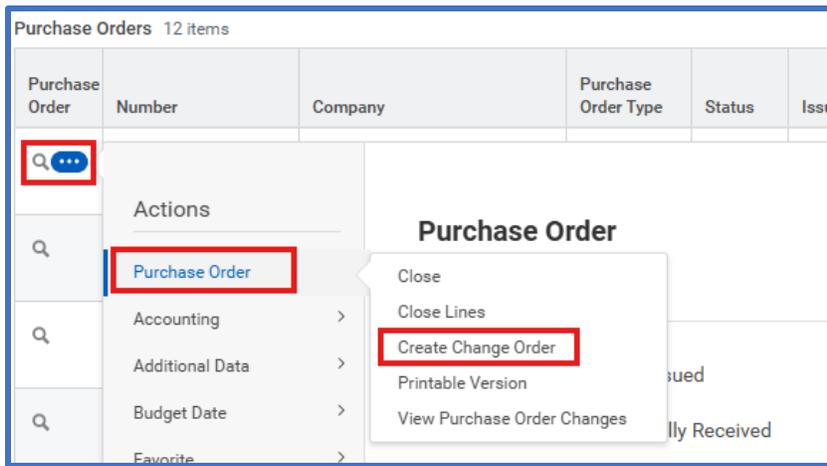
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.



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

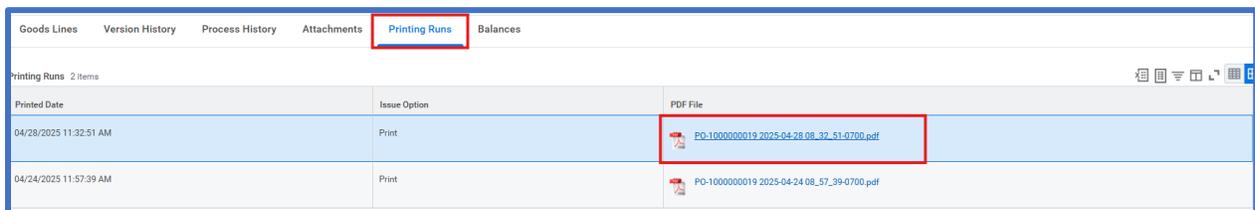
Once submitted, the change order follows an approval workflow

### Agency Requisitioner Confirmation:

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



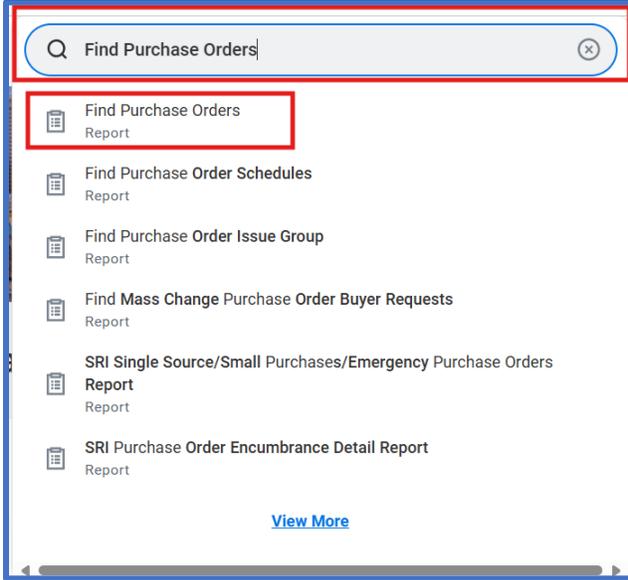
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



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

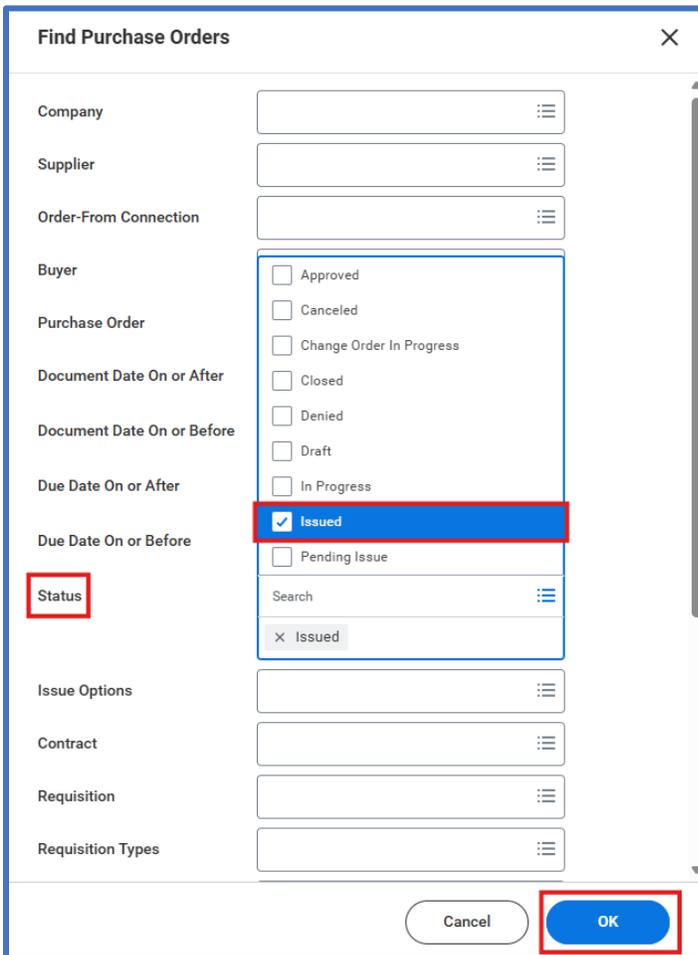
(**Note:** This option is best if you need to correct the splits on a single line.)

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



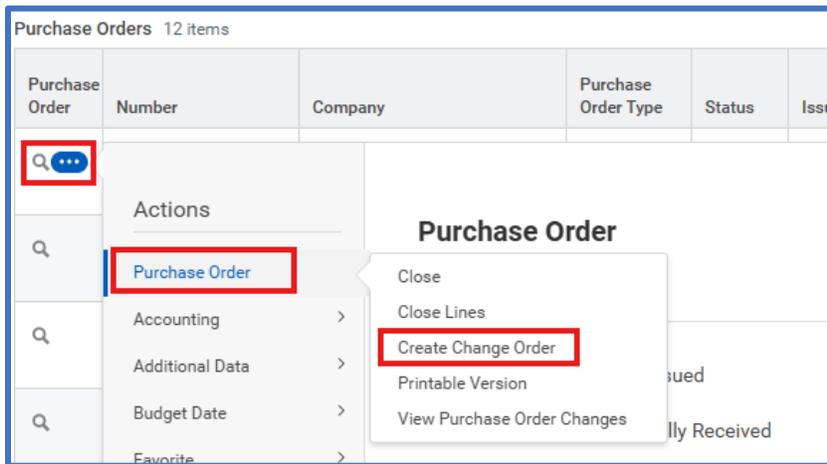
A screenshot of the Workday search bar. The search bar contains the text "Find Purchase Orders" and a clear button (X). Below the search bar, a list of search results is displayed, each with a calendar icon and the text "Report". The first result, "Find Purchase Orders Report", is highlighted with a red box. Other results include "Find Purchase Order Schedules Report", "Find Purchase Order Issue Group Report", "Find Mass Change Purchase Order Buyer Requests Report", "SRI Single Source/Small Purchases/Emergency Purchase Orders Report", and "SRI Purchase Order Encumbrance Detail Report". A "View More" link is located at the bottom of the list.

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



A screenshot of the "Find Purchase Orders" filter dialog box. The dialog box has a title bar with a close button (X). It contains several filter fields: "Company", "Supplier", "Order-From Connection", "Buyer", "Purchase Order", "Document Date On or After", "Document Date On or Before", "Due Date On or After", "Due Date On or Before", "Status", "Issue Options", "Contract", "Requisition", and "Requisition Types". The "Status" field is highlighted with a red box. The "Status" dropdown menu is open, showing a list of status options: "Approved", "Canceled", "Change Order In Progress", "Closed", "Denied", "Draft", "In Progress", "Issued", and "Pending Issue". The "Issued" option is checked and highlighted with a blue box. Below the dropdown menu, there is a search field and a list of selected items, including "Issued". At the bottom of the dialog box, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

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**.



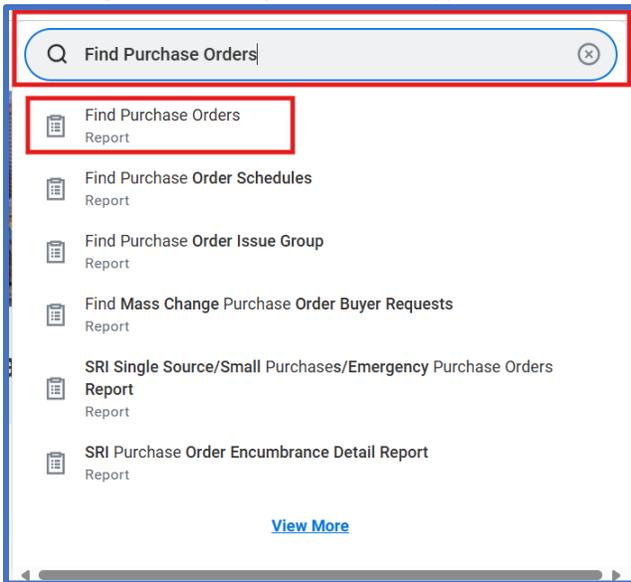
- To view the Issued Purchase Order:
  - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

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	<a href="#">PG-1000000019 2025-04-28 08_32_51-0700.pdf</a>			
04/24/2025 11:57:39 AM	Print	<a href="#">PG-1000000019 2025-04-24 08_57_39-0700.pdf</a>			

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

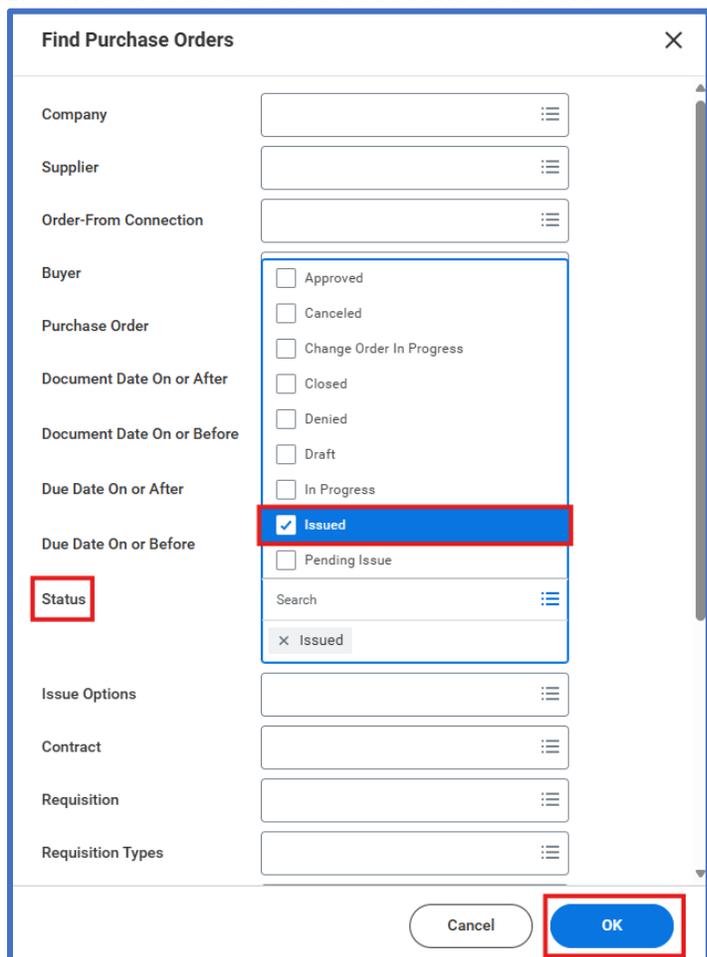
(*Note: This option is useful if the entire PO or several lines are incorrect and need to be re-sourced.*)

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



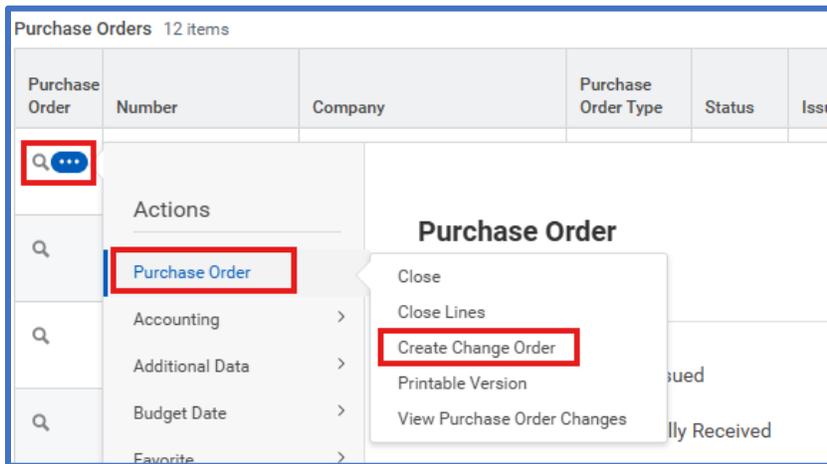
A screenshot of the Workday search bar. The search bar contains the text "Find Purchase Orders" and a clear button (X). Below the search bar, a list of search results is displayed. The first result, "Find Purchase Orders Report", is highlighted with a red box. Other results include "Find Purchase Order Schedules Report", "Find Purchase Order Issue Group Report", "Find Mass Change Purchase Order Buyer Requests Report", "SRI Single Source/Small Purchases/Emergency Purchase Orders Report", and "SRI Purchase Order Encumbrance Detail Report". A "View More" link is visible at the bottom of the list.

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



A screenshot of the "Find Purchase Orders" filter dialog box. The dialog box has a title bar with a close button (X). The main area contains several filter fields: "Company", "Supplier", "Order-From Connection", "Buyer", "Purchase Order", "Document Date On or After", "Document Date On or Before", "Due Date On or After", "Due Date On or Before", "Status", "Issue Options", "Contract", "Requisition", and "Requisition Types". The "Status" field is highlighted with a red box. The "Status" dropdown menu is open, showing a list of status options: "Approved", "Canceled", "Change Order In Progress", "Closed", "Denied", "Draft", "In Progress", "Issued", and "Pending Issue". The "Issued" option is selected and highlighted with a blue background and a red border. Below the "Status" field, there is a search bar and a list of selected items, including "Issued". At the bottom of the dialog box, there are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red box.

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.

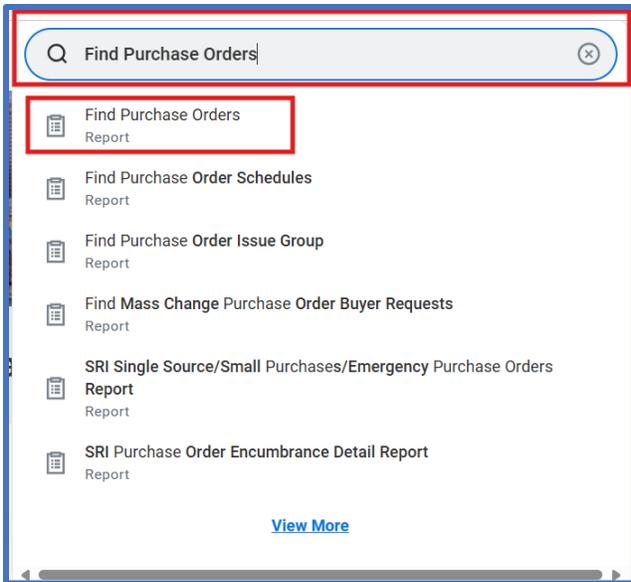
(**Note:** If the PO is a release PO (Buyer Autocreate) you must reach out to the Buyer of the Supplier Contract to manually cancel the PO.)

#### Agency Requisitioner Confirmation and Next Steps:

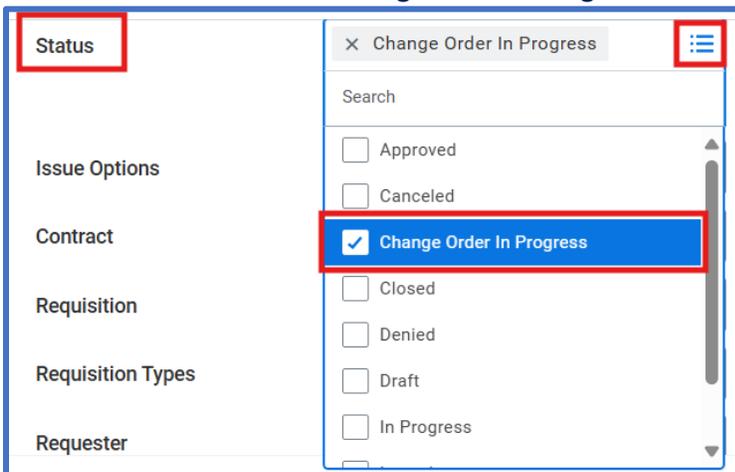
1. The Purchase Order will now reflect **Canceled** status.
2. Submit a new requisition, editing the line splits to reflect the correct allocations.

## Process for viewing the Process History for a Change Order:

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



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



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

Change Order	Version	Created On	Change Order Reason	Change Order Status	Total Amount
	2	10/03/2025	DOT Change Order	In Progress	505,001.00

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