ERP Job Aid

RI Enterprise Resource Planning



Change orders

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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.

Disclaimer:

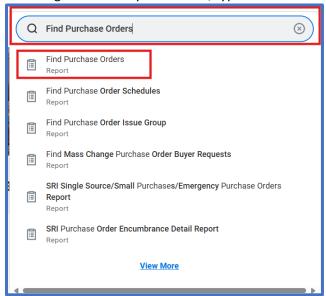
• The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.

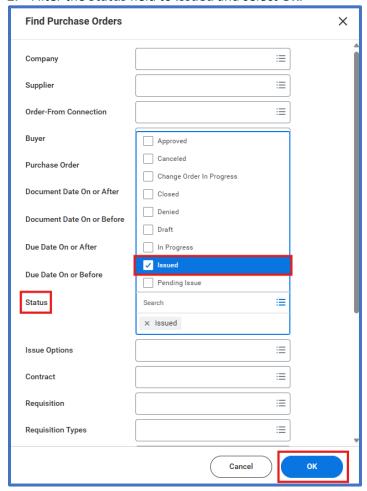
(**Note**: If the PO is a release PO (Buyer Auto Create) you must reach out to the Buyer of the Supplier Contract to manually cancel the PO.)

- 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.
 - o Locate the **Pending Changes** section and open the Change Order.
 - o Select the related actions (...) button next to the Version Number.
 - o Hover over Purchase Order Change and select Edit.
 - o Revise the change order process as necessary.

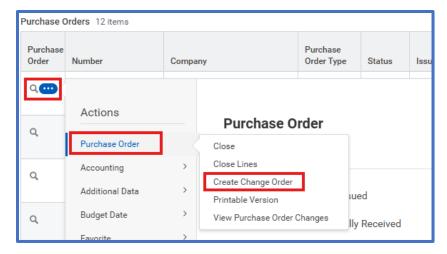
Process for Submitting a Change Order - Attachment:

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





- 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.



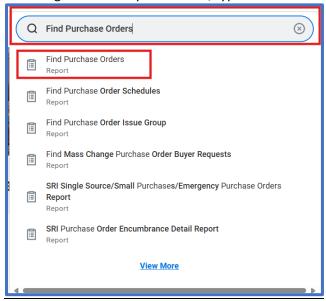
- To view the Issued Purchase Order:
 - Select the Printing Runs tab and then select the most recent Printed Date PDF File.

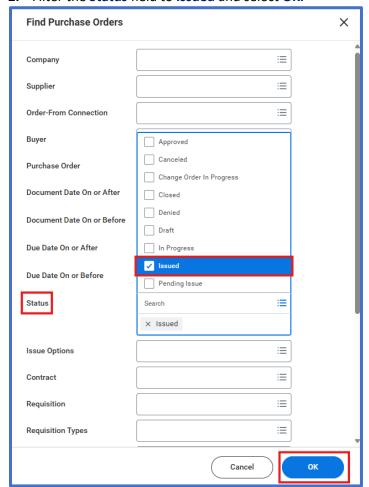


<u>Process for Submitting a Change Order – Cancel Line:</u>

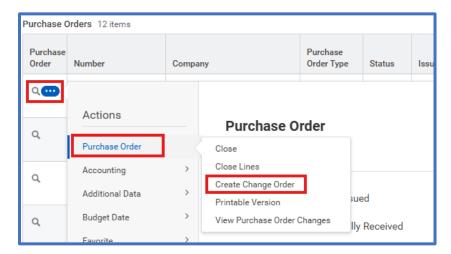
(**Note:** You cannot cancel a line which has already been received or invoiced.)

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





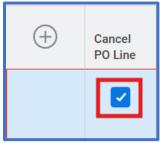
- 3. Locate the **Purchase Order** you are initiating a Change Order on and select the related actions button next to the magnifying glass icon.
- 4. Hover over 'Purchase Order,' and select 'Create Change Order'.



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.



- 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.



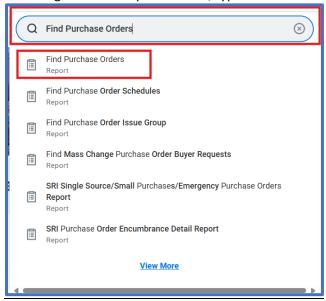
- To view the Issued Purchase Order:
 - Select the Printing Runs tab and then select the most recent Printed Date PDF File.

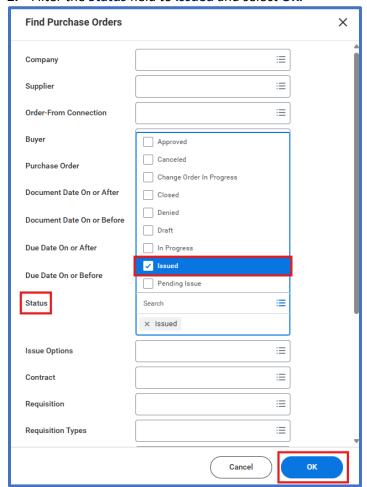


<u>Process for Submitting a Change Order – Cancel PO:</u>

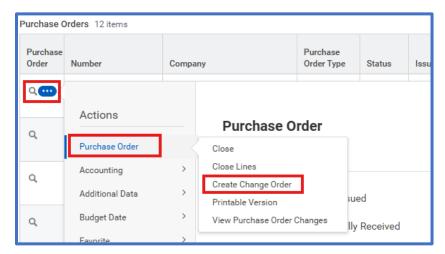
(Note: You cannot cancel a Purchase Order which has already been received or invoiced.)

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





- 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.)

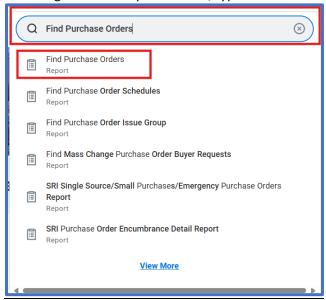
Agency Requisitioner Confirmation:

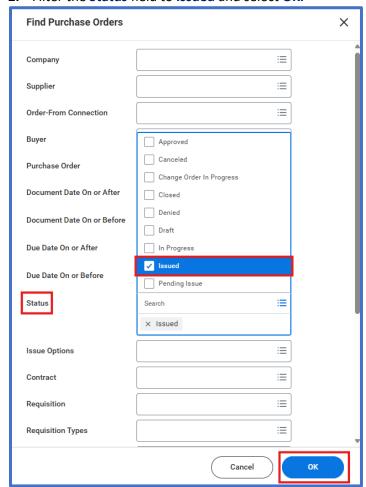
The Purchase Order will now reflect Canceled status.

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

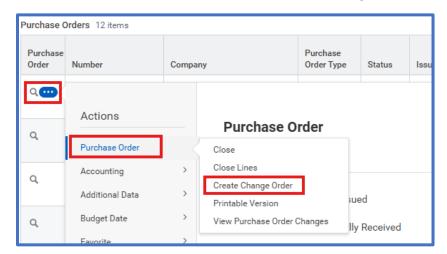
(Note: You cannot make edits to a line which has already been received or invoiced.)

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





- 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.
- 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

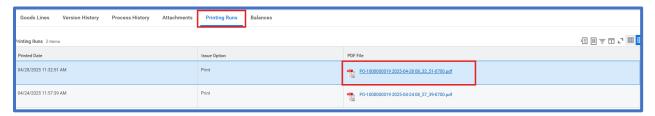
Once submitted, the change order follows an approval workflow.

Agency Requisitioner Confirmation:

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



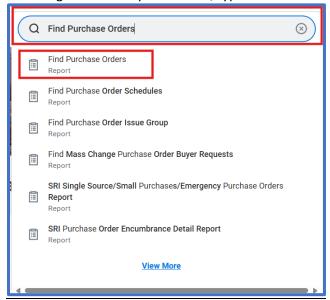
- To view the Issued Purchase Order:
 - o Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.

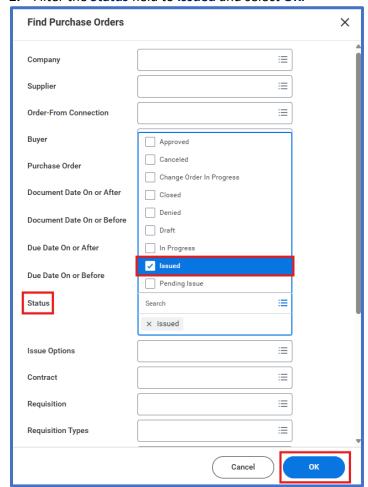


Process for Submitting a Change Order - Order-From Connection (Site Code)

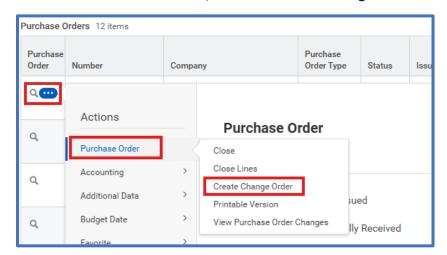
(Note: You cannot make edits to a line which has already been received or invoiced.)

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





- 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**.

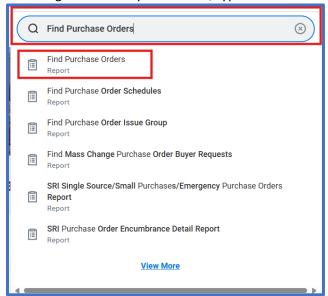


- To view the Issued Purchase Order:
 - Select the Printing Runs tab and then select the most recent Printed Date PDF File.

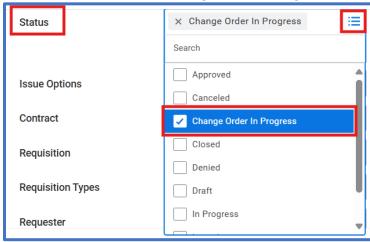


Process for viewing the Process History for a Change Order:

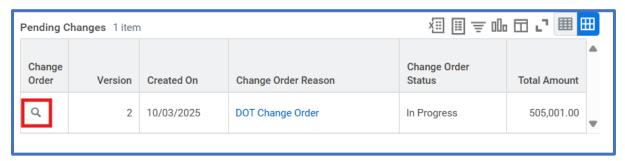
1. Using the Workday Search Bar, type Find Purchase Orders and select the report.



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.