



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:

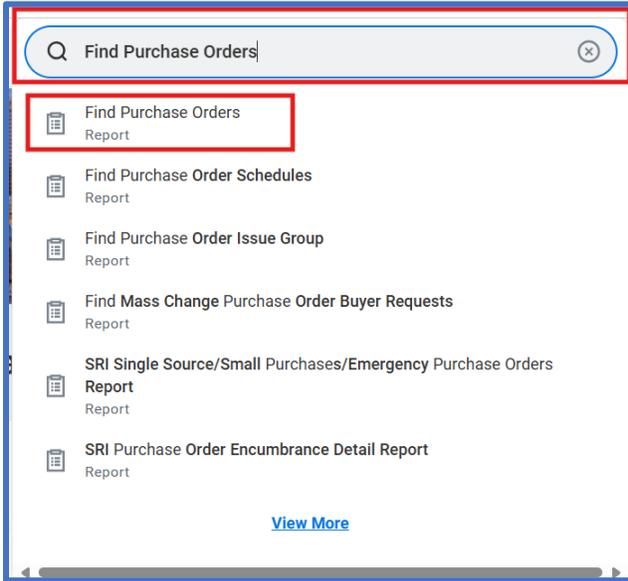
- The Change Order reason "Cancel PO" will **not** automatically cancel the Purchase Order upon completion. The Buyer of record must manually cancel the Purchase Order.
(Note: If the PO is a release PO (Buyer Auto Create) you must reach out to the Buyer of the Supplier Contract to manually cancel the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

Contents

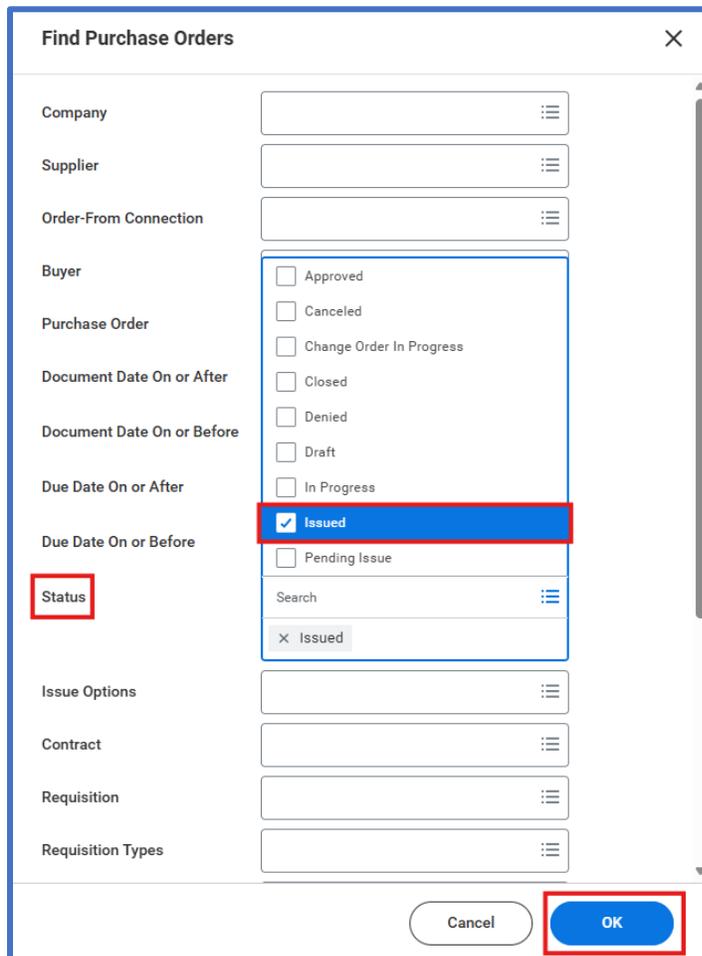
Reduce and Close a Purchase Order:	2
Reduce and Close a Purchase Order with Split Lines:	5

Reduce and Close a Purchase Order:

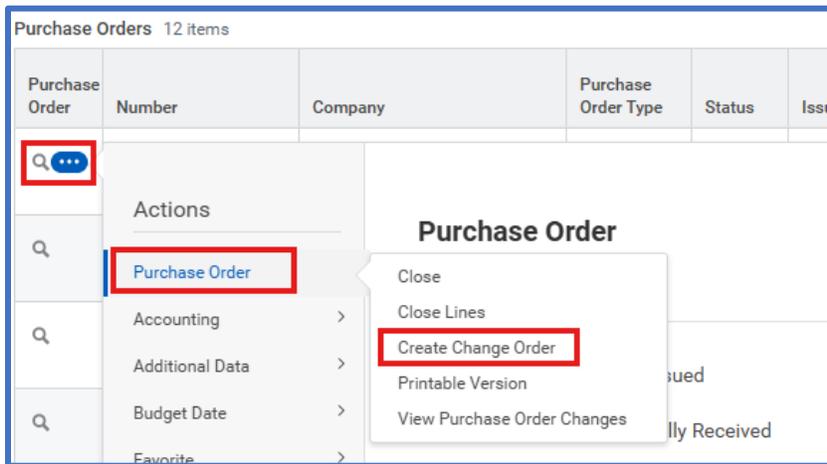
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.
*(Note: Alternatively, enter the **Purchase Order Number** in the Workday Search Bar and select Enter on your keyboard to search.)*



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, navigate to the **Amount** field.
9. To reduce the line(s) to the amount that has already been received or invoiced, update the **Ordered** field so that it reflects the total received or invoiced to date.

The screenshot shows a form with the following fields:

- Amount** (header)
- Ordered** (input field with value 12,202.43, highlighted with a red box)
- Received** (input field with value 0.00)
- Invoiced** (input field with value 12,202.43, highlighted with a red box)

10. 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.*)
11. 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**.

Version 1 Status Issued

- 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

Closing the Purchase Order:

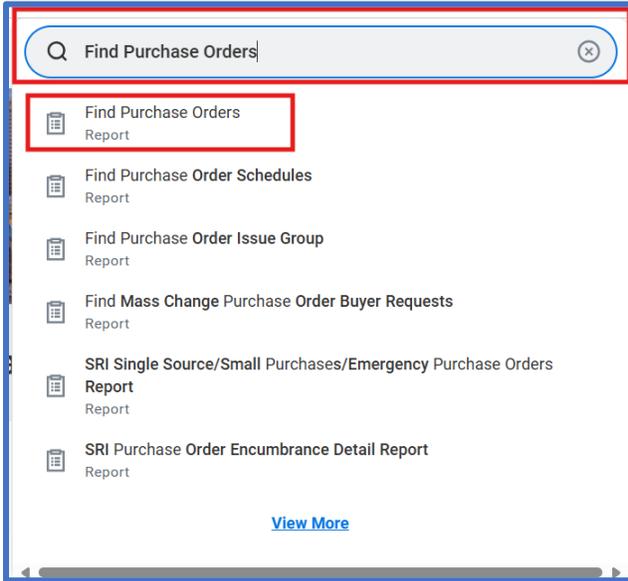
(Note: A Purchase Order cannot be closed if a receipt is in draft status or if an invoice is in progress. Any draft receipt must be submitted or canceled, and any in-progress invoice must be fully approved before the Purchase Order can be closed.)

1. To close the Purchase Order, select the Related Actions (...) icon next to the Purchase Order number.
2. Hover over Purchase Order and select **Close**.
3. Use the drop-down menu to select the appropriate Close Reason.
4. Select **OK** to confirm.
5. The Purchase Order status should now display as **Closed**.

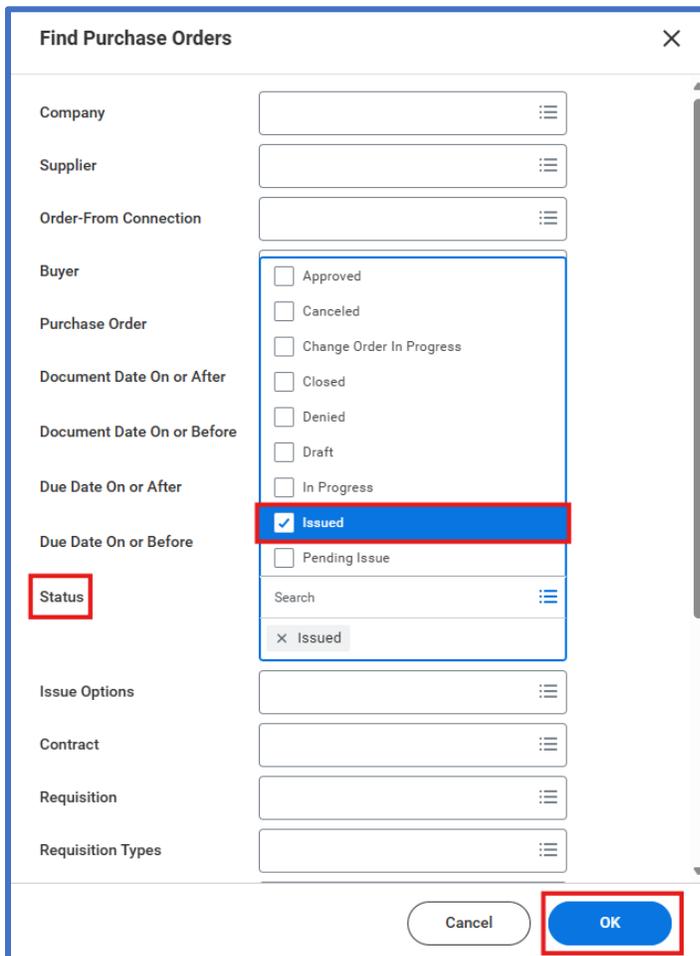
Status Closed

Reduce and Close a Purchase Order with Split Lines:

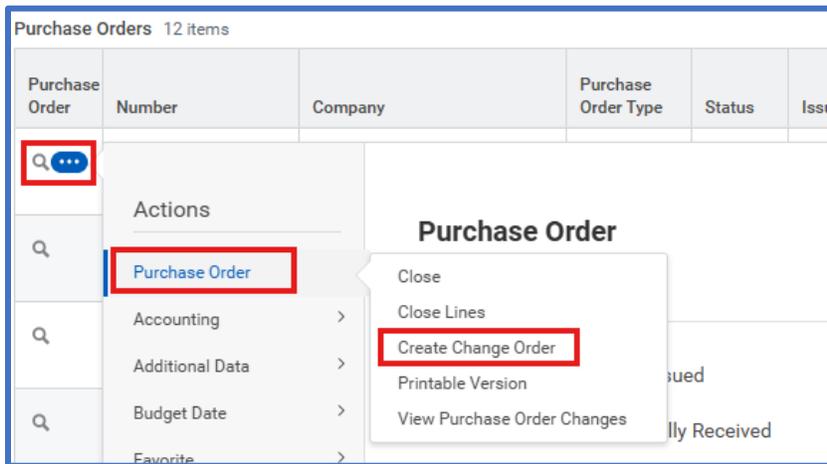
1. Using the Workday Search Bar, type **Find Purchase Orders** and select the report.
*(Note: Alternatively, enter the **Purchase Order Number** in the Workday Search Bar and select Enter on your keyboard to search.)*



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 **Services Lines** tab.
8. Using the horizontal scroll bar, navigate to the **Amount** field.
9. To reduce the line(s) to the amount that has already been received or invoiced, you must add a new line to the PO with a negative value to offset the line that you are trying to reduce.
10. Select the **(+) Add Row** icon to add a new line.
 - a. Add details to the new line, ensuring that you are copying all details, including worktags, included in the original line that you are trying to reduce.
 - b. Using the Ordered field, enter the negative value you are trying to reduce.

Quantity	Amount
Ordered <input type="text" value="144"/>	Ordered <input type="text" value="-243.34"/>
Received 98	Received 0.00
Invoiced 98	Invoiced 0.00

11. 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.*)
12. Select **Submit** to finalize the change order.

Approval Process

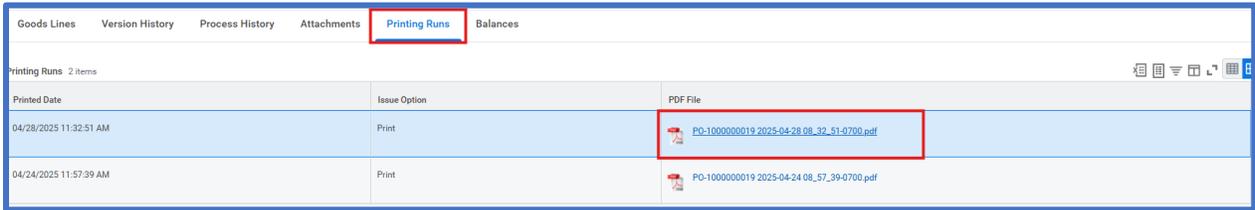
Once submitted, the change order follows an approval workflow

Agency Requisitioner Confirmation:

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



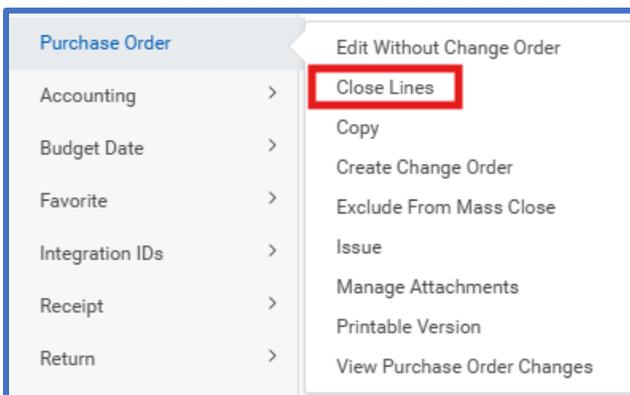
- To view the Issued Purchase Order:
 - Select the **Printing Runs** tab and then select the most recent Printed Date PDF File.



Closing the Purchase Order or Lines:

(Note: A Purchase Order cannot be closed if a receipt is in draft status or if an invoice is in progress. Any draft receipt must be submitted or canceled, and any in-progress invoice must be fully approved before the Purchase Order can be closed.)

1. To close the Purchase Order or Lines, select the Related Actions (...) icon next to the Purchase Order number.
2. Hover over Purchase Order and select **Close** or **Close Lines**.



3. Close both the newly added negative line, and the line that you needed to reduce.
4. Use the drop-down menu to select the appropriate Close Reason.
5. Select **OK** to confirm.
6. The Purchase Order status or Purchase Order Lines should now display as **Closed**.



7. The corresponding amounts should now be correctly restored to the Supplier Contract.