

A Change Order is used to modify Purchase Order details. They allow you to modify the Purchase Order commitment (dollar, time, service), communicate an update to vendors, or resolve an exception. Change orders are also used to modify the distribution/allocation indicated in the ChartField(s) specified in the original Purchase Order.

Navigating to the PO Change Order Jump Page

Click the Buying and Paying tile and then click the Change Order Processing tab.



Or, click the NavBar > Main Menu > Purchasing > Purchase Orders > PO Change Order Jump Page. The PO Change Order Jump Page appears.

ange Orders Jump Page			- du	Spin.	-	action	
PO Change Order J	lump Page	1 the			*Non-Pro		
Business Unit	e v COLUM	0					
PO Number	= 7						
PO Status	= Dispato	hed					
Short Supplier Name	begin: V	Q					
Supplier ID	begin: V	Q					
Supplier Name	begin: •		Q				
Search Clear Search Result							
				Per	sonalize Find View All 💷 🔜	First 🕚	1 of 1 🕑 La
Business Unit	PO ID	PO Date	Supplier ID	Short Supplier Name	Supplier Name	PO Status	Budge Checkin Header Statu
I							
*Change Type Price/Qua	ntity	•	Create	Change Order		in	

Searching for the Purchase Order(s) to Change

1. Enter the Purchase Order information in the search fields.

Business Unit	= •	COLUM Q		
PO Number	begin: •		Q	
PO Date	= •		31	
PO Status	=	Dispatched		
Short Supplier Name 🦯	begin: •			Q
Supplier ID	begin: •		Q	
Supplier Name	begin: •			

- 2. Click Search.
- 2. Select the Purchase Order you want to change from the search results.

		Business Unit	POID	PO Date	Supplier ID	Short Supplier Name	Supplier Name	PO Status	Budget Checking
									Header Status
	1	COLUM	0000080030	10/19/2016	0000084931	XENICS USA-001	XENICS USA INC	Dispatched	Valio
۲	2	COLUM	0000080032	10/19/2016	0000010007	APPLE INC-001	APPLE INC	Dispatched	Valio
	3	COLUM	0000080033	10/19/2016	0000073061	MTS SYSTEM-001	MTS SYSTEMS CORP	Dispatched	Valio
	4	COLUM	0000080035	10/19/2016	0000122146	DYNAMISM I-001	DYNAMISM INC	Dispatched	Valio
	5	COLUM	0000080038	10/19/2016	0000045621	GROSSMAN M	GROSSMAN MARKETING GROUP	Dispatched	Valio

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Creating a Financial (Distribution Only) Change Order

A Financial Change Order is a change to the distribution/allocation indicated in the ChartField(s) specified in the original Purchase Order. For example, if you need to update or change the Department or Project being expensed.

Note: You cannot create a Financial Change Order if vouchers have already been paid against the line you want to change.

- 1. Search for and select Purchase Order to be changed.
- 2. Select *Financial (Distribution Only)* from the **Change Type** dropdown.

*Change Type	Price/Quantity	Ŧ
	Financial (Distribution	Only)
	Price/Quantity	3

3. Click Create Change Order.

Create Change Order

The Maintain Distribution page appears.

Mainta	in Distributions					"aoit					dia	14 14
(Some	Business Unit	COLUM								Status Dis	patched	
Pro	PO ID	000008003	2	- and - P					Budge	et Status Val	id 📷	
	Change Order	2		* Hom					PO Re	eference	1	
	Supplier Buyer	APPLE INC-	-001 andy R									
	Line	1 iMa	ac 27"						Sche	dule Qty	2.0000)
									Merchandise	Amount	5,188.00	USD
	Schedule	1							Doc. Base	e Amount	5,188.00	USD
- Coot	Distribute By	Quantity							Encumbrance Expense	Balance d to Date	5,188.000	USD USD
Distrit	bution							Persor	nalize Find Y	view All 💷	💽 First 🤇	🖲 1 of 1 🕑 Last
Chart	fields Details/Ta	x <u>A</u> sset Ir	nformation	Req Detail	<u>S</u> tatuses	Budget Int	ormation					
Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	*Account		Dept	PC Bus Unit	Project	Activity
1	Open	100.0000	2.0000	5,188.00	USD	COLUMQ	61925	Q	4028105 🔍	GENRL Q	UR003343 Q	01
	4											•
View Sav	turn to Search	Previous i	in List 🛛 🚛	Next in List	Notify	ction						Va

- 4. Make the necessary changes to the ChartFields in the **Distribution** section.
- 5. Click Save and Submit.
- 6. Click the **Budget Check** icon to budget check.







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Creating a Price / Quantity Change Order

A Price/Quantity Change Order is a change made to the line attributes of the Purchase Order such as the price, quantity, period of performance or category of the good or service being purchased.

- 1. Search for and select Purchase Order to be changed.
- 2. Select *Price/Quantity* from the **Change Type** dropdown.



3. Click Create Change Order.

Create Change Order

The Maintain Purchase Order page appears.



Click the **Details**, **Statuses** or **Attributes** tabs for more information about your Purchase Order lines. The **Amount Only** flag is displayed on the Attributes tab.

Details	Shij	o <u>T</u> o/Due Date	Statuses	ltem In	formation	Attributes	<u>R</u> FQ	<u>C</u> ontra	ct <u>R</u> eceiving				
Line		Item			Description				Physical Nature	*Price Qty	*Price Date	Amount Only	
1					Quote # 62 Solution	84-9967-69 Pa	raformalo	lehyde	Services v	Schedule V	Due 🔻		+

Changing Price

If the **Price** field is available for edit (the Amount Only flag is checked on the Attributes tab) you can change the Price for the desired line(s) on the Details tab.

runea 6	υ.							relaonanze	Lining Lynew yer h		1105	- 1011	- Last
Details		Ship To/Due Date Statuses	Item Information Attributes	R	Q <u>C</u> ontrac	t <u>R</u> ece	aiving 🚥						
ine		Item	Description		PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
	ł	b	Extended Software Maintenance	s,	1.0000	EA	81112200 Q	6,551.00000	6,551.00	Approved	P	10	Ð E

Changing Quantity

If you need to edit the Quantity of a product, change the **PO Qty** field to the desired quantity.

Lines	2						Personalize Fi	nd View All 🖸		First 4	1-2 of 2	(Last
Details	Ship To/Due Date Statuses	item Information Attributes	BFQ	Contract	Rec	eiving (
Line	item	Description		PO Qty	NOU	Category	Price	Merchandise Amount	Status			
1		iMac 27"	6	1.0000	EA	43211500 Q	2,594.00000	2,594.00	Approved	Ø	120	E
2		Apple Care Protection Plan	6	1.0000	EA	43211500 Q	119.00000	119.00	Approved	Q	12	* =



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Updating Ship-to Information

1. Click the **Ship To/Due Date** tab.

S	Ship To/Due Date	Statuses	Item Information	Attributes	1	RFQ	Contra	ct <u>R</u> e	ceiving [
	Item		Description				PO Qty	*UOM	Category
			Part# 562665: Hallo	well etv-View					
晶			Locker Six Tier 12x1	8x12 18	E.		1.0000	EA	56122000
	s	Ship To/Due Date	Ship To/Due Date Statuses	Ship To/Due Date Statuses Item Information Item Description Part# 562665: Hallo USVP3288-6PT Saft Locker Six Tier 12x1	Ship To/Due Date Statuses Item Information Attributes Item Description Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 Door Linassembled	Ship To/Due Date Statuses Item Information Attributes I Item Description I Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 Doort Inassembled I	Ship To/Due Date Statuses Item Information Attributes RFQ Item Description Item Information Item Information Item Information Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 Door Information Item Information Item Information	Ship Io/Due Date Statuses Item Information Attributes RFQ Contrait Item Description PO Qty Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 Image: Contrait 1.0000 Image: Contrait Description Image: Contrait 1.0000	Ship To/Due Date Statuses Item Information Attributes RFQ Contract Re Item Description PO Qty *UOM Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 1.0000 EA

2. Click the Ship-to search icon for the line requiring the shipping change.

Lines (2	Lines 😨 Personalize Find View All										2 1	ast
Details	Ship To/Due Date	Statuses	Item Information	Attributes	<u>R</u> FQ	<u>Contract</u>	Receiving					
Line	item		Description			Due Date		Ship To	Price			
1	10h		iMac 27"			10/29/2016	. 10	632W125THS	Q 2,594.00000	12	+	
2			Apple Care	Protection Pl	an	10/29/2016	s (g	632W125THS	Q 119.00000	12	÷	-

The Lookup Ship-to window appears.

Look Up Shi	ір То		
SettD:		CUSE	T.
Ship To Locatio	on: begins w	ith 💌	
Description:	begins w	th v	
	Association and a second		
Look Up	Clear	Cancel	Basic Looku
earch Resu	its		4
ly the first 30	0 results can	be displayed	1.
iew 100	Firs	1-300 :	# 300 (Last
Np To Locatio	n Description	1	
0000100EC	2920 Broa	dwayFL01RM	NDOEC
00010109	2920 Broa	dwayFL01RM	40109
00011AAA	2920 Broa	dwayFL01R/	AAA1
00020206	2920 Broa	dwayFL02RI	40206
00020220	2920 Broa	dwayFL02RM	W0220
00020LD2	2920 Broa	dwayFL02RM	VOLD2
0002203E	2920 Broa	dwayFL02RM	4203E
0002203F	2920 Broa	dwayFL02RM	//203F
00002203J	2920 Broa	dwayFL02RM	4203J
000022603	2920 Broa	dwayFL02RI	//2603
000030301	2920 Broa	dwayFL03Rh	V0301
000030303	2920 Broa	dwayFL03RM	V0303
00003306D	2920 Broa	dwayFL03R/	4306D
0003309A	2920 Broa	dwayFL03R/	ARDEN
0003CAFE	2920 Broa	dwayFL03RM	NCAFE
00003CAFÉ	2920 Broa	dwayFL03RM	VICAFÉ
0003KTCH	2920 Broa	dwayFL03R/	NKTCH
0004CAFE	2920 Broa	dwayFL04RI	VICAFÉ.
00050515	2920 Broa	dwayFL05RM	W0515
0005510M	2920 Broa	dwayFL05R/	4510M
00070700	2920 Broa	dwayFL07RM	40700
000070CR1	2920 Broa	dwayFL07RM	MOCR1
00007700F	2920 Broa	dwayFL07RM	4700F
XXXX7000C	2920 Broa	dwayFL07RM	NXXXXX
00808000	2920 Broa	dwayFLOBRA	10800

3. Search and select your **Ship To Location**. **Note:** *If your Ship To address needs to be added to the list of Locations, enter a Service Now request.*

Adding New Line(s)

1. Click the + button to add a new Line(s) to the Purchase Order. .

OK Cancel

Line	Item	Description		PO Qt)	'UOM	Category		Price	Amount	Status			
1	B.	iMac 27*	截	1.000	EA	43211500	a	2,594.00000	2,594.00	Approved	Ø	1123	H
2	8	Apple Care Protection Plan	53	1,000	EA	43211500	a.	119.00000	119.00	Approved	0	13	* -

- arcprf-upg.enterprise.columbia.edu:10443 says: Enter number of rows to add:
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The 1	ne	w Line(s	s) app	ear.													
Lines @											Personalize F	nd View All I		First	@ 1-3 of 3		ast.
Details	1	Ship <u>T</u> o/Due Date	Statuses	Jiem Information	Attributes		RFQ Contra	act Re	ceiving [9							
Line		Rem		Description			PO Qty	"UOM	Category		Price	Merchandise Amount	Status				
1	B			Part# 562665. Hallo USVP3288-6PT Sat Locker Six Tier 12x1 Door Unassembled Parchment	well ety-View IB×12 18	氨	1.000	EA	56122000	q	551 34000	551.34	Approved	Q	123	ŧ	
3	些		Q	_	100	氨			6	Q.	0	0.000	Pending	0	12		-
2	1			Shipping		氨	1.000	EA	56122000	a	160.00000	160.00	Approved	P	13	+	-

20

- 3. Complete the Details for the new Line(s).
- 4. Click the **Schedule** icon to enter the Distribution for each new Line.
- 5. Click the **Distribution/ChartString** icon.

Unit COLUM								Supplier GLOBAL	EQU		PO Stat	us Dis	patch	ed			
PO ID 0000080005							PO Date 10/18/201										
io Mi	ain Pa	ge												\$			
ines											Find V	iew All		First	3 2 of	3 🕑	Las
Line 3		3 Item			Part# 570000 PO Qty					1.0000 EA Merchandise Amt 600.00 U					USD		
dul	les								lew All 💷 🔜 🛛 First 🛞 1 of 1 🛞 Last						ast		
ils	St	tuses	Shipment		Matching	Receivin	ng	Ereight BTV	[TTT)								
		*Due	Date		*Ship To			"PO Qty	Price	Merchandise Amount	Status						
		02/2	1/2017	B	500W12	OTHS Q	58	1.0000	600.00000	600.00	Active	1	4	ø		+	=
ils	St	*Due	Shipment Date 1/2017		Ship To	Beceivin	ng	Ereight BTV "Po Qty 1.0000	Price 600.00000	Merchandise Amount 600.00	Status Active	ø	4	6			+

6. Update the Distribution **ChartFields** or use the **SpeedChart** to add the ChartString for the Distribution.

Distrib	outions	s for Schedul	e 1														
		Unit	COLUM			Supplier	GLOBAL FOU					- 11					
		PO ID	0000080005			Item		Parte	5700	00							
		Line	3					111		1.11							
		Schedule	1			Status	Active										
	,	Distribute By	Quantity	*								Sched	ule Otv	3	1 0000		
		*Liquidate By	Amount	٣							Me	rchandise /	Amount		800.00	USD	
		SpeedChart		Q	Multi-SpeedChar	rts					1	Doc. Base /	Amount	203	500.00	USD	
Distri	bution	1							P	ersonalic	te Fir	nd View Al		First		t of 1	Last
Chart	tfields	Details/Tax	Asset Info	rmation	Req Detail	Statuses	Budget Information	n (1111)									
Dist	Stat	ture	Percent	PO Qty	Merchandise Amount	Currency	"GL Unit	*Account		Dept		PC Bus Unit	Project	Ac	tivity		
	Ope	en [100.0000	1.0000	600.00	USD	COLUMO	61500	Q		Q	Q		a			Q
										6							
		-															
OK	¢	Gancel	Refresh					- 45								14	

- 7. Click OK.
- 8. You can click Save & Submit or click Return to Main Page to continue working on the Change Order.

Uploading Justification Documentation

For Price/Quantity Change Orders, it is helpful to have one or more of the following applicable documents for upload:

- An invoice showing the change
- Agreement or contract amendment
- Proposal or quote with details
- A memo that gives your explanation for the change
- 1. Click the **Procurement EDM** button.



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The Procurement Documentation Application opens displaying your Purchase Order information with existing documentation.

Note: If the application opens to the search page you can find your Purchase Order by entering the PO Number.

Intro Purchasing	Accounts Payable	Vendor Management	Journal Entries	Core Documents Matrix	
me - Purchasing					
urchasing					
leader					
Requisition Number	0000085661				
PONumber	0000080132				
VendorName	RIEGL USA ING				
Conmodity Group	Services				
Sole Source	No				
UwPA	No				
Total Value	\$6,551.00				
Purchasing Contact Info	Sean Bahrami, E	imail: sb3845@columbia.edu, l	Phone: +1 212 853 0727		
Current Status	COMPLETED				
Care Documents					
This purchase has all of the p	ore documents. Please teel	I free to upload any additional of	bournents below.		
edexed Documents					
Document Name				Submittal Date	Submitted By
BUD AND ALL AN				CONTRACTOR OF CONTRACTOR	

2. Indicate the Number of Documents to Upload from the dropdown.



3. For each document you are uploading, indicate Change Order Justification from the dropdown.



- 4. Click Choose File for each document you are uploading and select the document to upload.
- 5. Click the Upload Documents button.

Upload Documents



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Saving and Submitting a Price/Quantity Change Order

- 1. Click Save and Submit.
 - Save and Submit

The Reason Code Page appears. You must select a Reason Code and provide any additional Comments for Approvers.

Reason Code Page	×
Enter a reason code and comment for making changes that are being trac	ked.
Unit COLUM POID 0000080132	
Reason Code Q	
Comment	
ALERO	
Use Same Reason Code	
OK Cancel Refresh	

2. Click the **Search** icon to select a **Reason Code**. The Look Up Reason Code appears.

Look Up Rea	ason Code							
SetID:	30	CUSET						
Reason Type:		Procurem	ent Change					
Reason Code:	begins with	v						
Description:	begins with	•						
Look Up	Clear	Cancel	Basic Lookup					
Search Resul	ts		_					
View 100		Fin	st 🕙 1-14 of 14	🕑 Last				
Reason Code	Description							
ADDPOTERMS Additional PO terms required after issuance								
ADDTIME	Additional T	me Required	for Original Sco	pe of Wor				
ADDVALUE	Additional V	alue Require	d for Original Sco	pe				
CANCELPO	Cancel PO f	or performan	ce issues					
CANCNOFUND	Cancel PO d	lue to non-av	ailability of fundi	ng				
CANFORCONV	Cancel purc	hase order fo	or convenience					
CLOSEDPO	Close PO du	e to complet	ed scope of work					
EXHANGE	EXHANGE Cost Adjustment Due to Exchange Rate Change							
LABORRATE	LABORRATE Add'I cost due to raw material/labor rate change							
NEWGRANT	Add value d	ue to new ava	ailable grant/fund					
NEXTPHASE	Next Phase(s) of a Multi-I	Phase Project					
NEXTYEAR	Next Year in	Multi Year C	ontract					
SHIPTOL	Shipping & I	Handling Exc	eed AP Toleranc	е				
TIMEVALUE	Additional T	me Value Re	quired for Origin	al Scope				
			Alon					

3. Select the appropriate Reason Code.

4. Type any additional Comments.



- 5. Click OK.
- 6. On the Change Order page, click the **Budget Check** icon to budget check.



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Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>