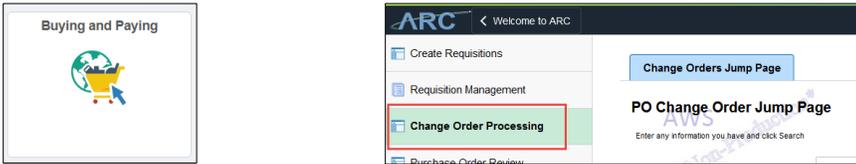


A Change Order is used to modify Purchase Order details. They allow you to modify the Purchase Order commitment (dollar, time, service), communicate an update to vendors, or resolve an exception. Change orders are also used to modify the distribution/allocation indicated in the ChartField(s) specified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

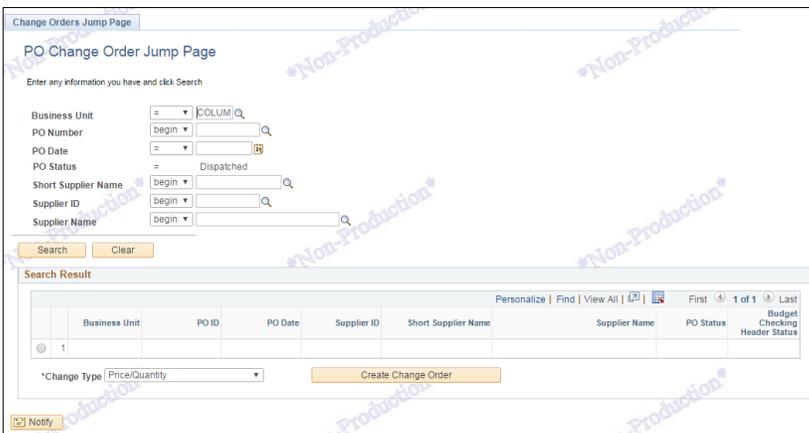
## Navigating to the PO Change Order Jump Page

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



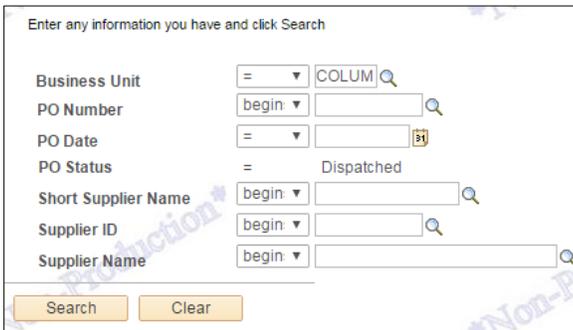
Or, click the **NavBar > Main Menu > Purchasing > Purchase Orders > PO Change Order Jump Page**.

The PO Change Order Jump Page appears.



## Searching for the Purchase Order(s) to Change

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



2. Click **Search**.

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

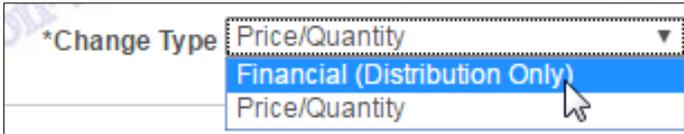


## Creating a Financial (Distribution Only) Change Order

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.

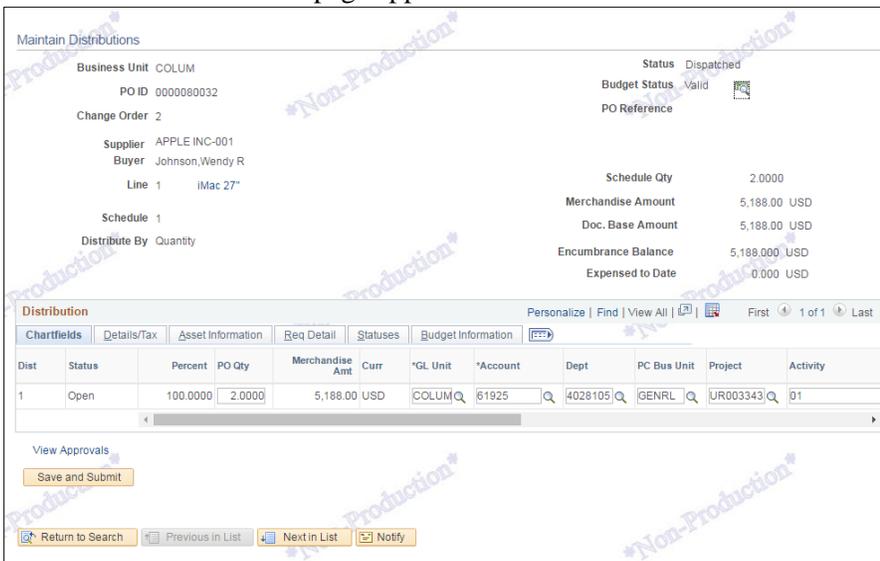
1. Search for and select Purchase Order to be changed.
2. Select *Financial (Distribution Only)* from the **Change Type** dropdown.



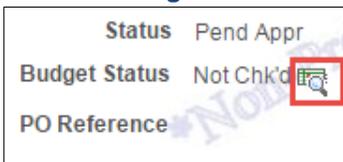
3. Click **Create Change Order**.



The Maintain Distribution page appears.



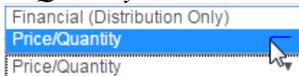
4. Make the necessary changes to the ChartFields in the **Distribution** section.
5. Click **Save and Submit**.
6. Click the **Budget Check** icon to budget check.



## Creating a Price / Quantity Change Order

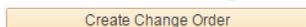
A Price/Quantity Change Order is a change made to the line attributes of the Purchase Order such as the price, quantity, period of performance or category of the good or service being purchased.

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

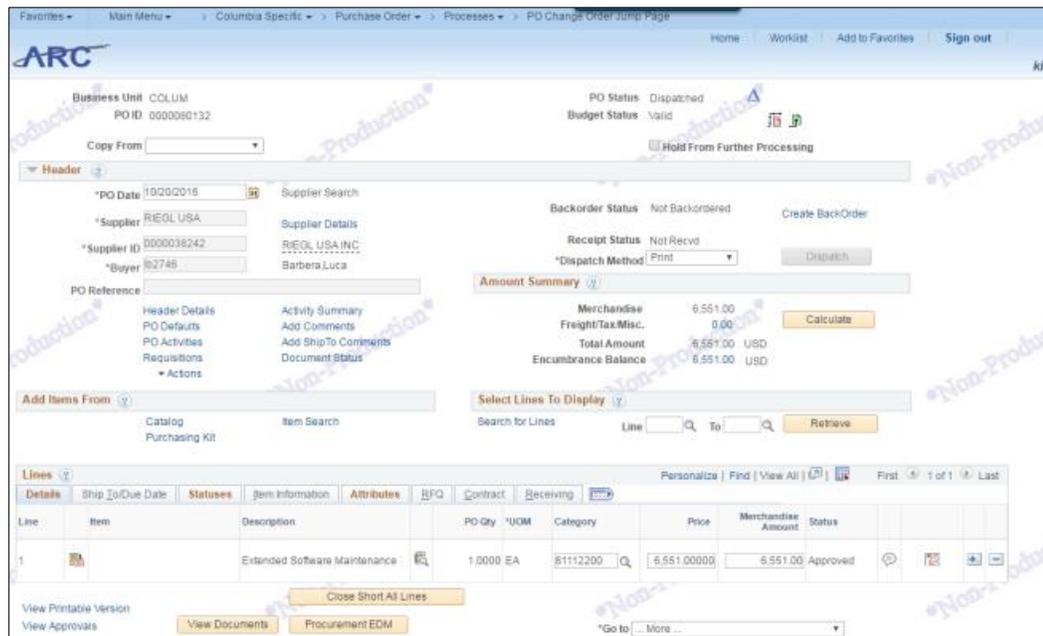


\*Change Type

3. Click **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	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving
Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only	
1		Quote # 6284-9967-69 Paraformaldehyde Solution	Services	Schedule	Due	<input checked="" type="checkbox"/>	

### 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.

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
		Extended Software Maintenance	1.0000	EA	81112200	6.551.00000	6.551.00	Approved

### Changing Quantity

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

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	
Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		iMac 27"	1.0000	EA	43211500	2.594.00000	2.594.00	Approved
2		Apple Care Protection Plan	1.0000	EA	43211500	119.00000	119.00	Approved

## Updating Ship-to Information

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

Lines ?								
Details		Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving
Line	Item	Description	PO Qty	*UOM	Category			
1		Part# 562665: Hallowell USVP3288-6PT Safety-View Locker Six Tier 12x18x12 18 Door Unassembled Parchment	1.0000	EA	56122000			

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

Lines ?							Personalize	Find	View All	First	1-2 of 2	Last
Details		Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving				
Line	Item	Description	Due Date	Ship To	Price							
1		iMac 27"	10/29/2016	632W125THS	2,594.00000							
2		Apple Care Protection Plan	10/29/2016	632W125THS	119.00000							

The Lookup Ship-to window appears.

Look Up Ship To

SetID: CUSET

Ship To Location: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Ship To Location	Description
10000100EC	2920 BroadwayFL01RM00EC
1000010109	2920 BroadwayFL01RM0109
1000011AAA	2920 BroadwayFL01RM1AAA
1000020206	2920 BroadwayFL02RM0206
1000020220	2920 BroadwayFL02RM0220
1000020LD2	2920 BroadwayFL02RM0LD2
100002203E	2920 BroadwayFL02RM203E
100002203F	2920 BroadwayFL02RM203F
100002203J	2920 BroadwayFL02RM203J
1000022603	2920 BroadwayFL02RM2603
1000030301	2920 BroadwayFL03RM0301
1000030303	2920 BroadwayFL03RM0303
100003306D	2920 BroadwayFL03RM306D
100003309A	2920 BroadwayFL03RM309A
100003CAFE	2920 BroadwayFL03RMCAFE
100003CAFÉ	2920 BroadwayFL03RMCAFÉ
100003KTCH	2920 BroadwayFL03RMKTCH
100004CAFÉ	2920 BroadwayFL04RMCAFÉ
1000050515	2920 BroadwayFL05RM0515
100005510M	2920 BroadwayFL05RM510M
1000070700	2920 BroadwayFL07RM0700
1000070CR1	2920 BroadwayFL07RM0CR1
100007700F	2920 BroadwayFL07RM700F
100007XXXX	2920 BroadwayFL07RMXXXX
1000080800	2920 BroadwayFL08RM0800

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.

Lines ?										Personalize	Find	View All	First	1-2 of 2	Last
Details		Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving							
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status							
1		iMac 27"	1.0000	EA	43211500	2,594.00000		Approved							
2		Apple Care Protection Plan	1.0000	EA	43211500	119.00000	119.00	Approved							

2. Indicate the number of Lines to add.

arcprf-upg.enterprise.columbia.edu:10443 says:

Enter number of rows to add:

OK Cancel

The new Line(s) appear.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Part# 562665; Hallowell USVP3268-6PT Safety-View Locker Six Tier 12x18x12 18 Door Unassembled Parchment.	1.0000	EA	56122000	551.34000	551.34	Approved
3						0	0.000	Pending
2		Shipping	1.0000	EA	56122000	160.00000	160.00	Approved

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.

Maintain Purchase Order

**Schedules**

Unit COLUM Supplier GLOBAL EQU PO Status Dispatched  
 PO ID 0000080005 PO Date 10/18/2016

Return to Main Page

Line	Item	Part#	PO Qty	*UOM	Merchandise Amt
Line 3		Part# 570000	1.0000	EA	600.00 USD

**Schedules**

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	02/21/2017	500W120THS	1.0000	600.00000	600.00	Active

Add ShipTo Comments

Save & Submit Return to Search Notify Refresh Add Update/Display

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

Distributions for Schedule 1

Unit COLUM Supplier GLOBAL EQU  
 PO ID 0000080005 Item Part# 570000  
 Line 3 Status Active  
 Schedule 1

\*Distribute By Quantity  
 \*Liquidate By Amount

SpeedChart Multi-SpeedCharts

Schedule Qty 1.0000  
 Merchandise Amount 600.00 USD  
 Doc. Base Amount 600.00 USD

**Distribution**

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Dept	PC Bus Unit	Project	Activity
1	Open	100.0000	1.0000	600.00	USD	COLUM	61500				

OK Cancel Refresh

7. Click **OK**.

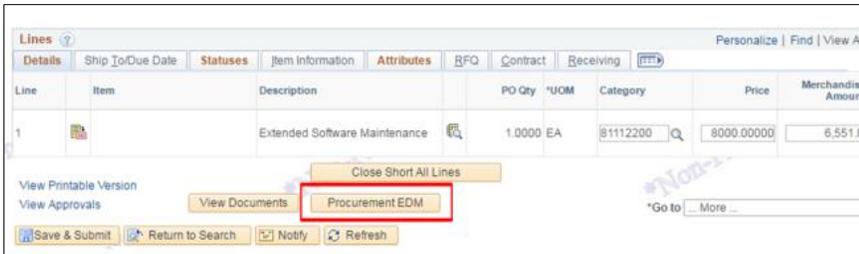
8. You can click **Save & Submit** or click **Return to Main Page** to continue working on the Change Order.

### Uploading Justification Documentation

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

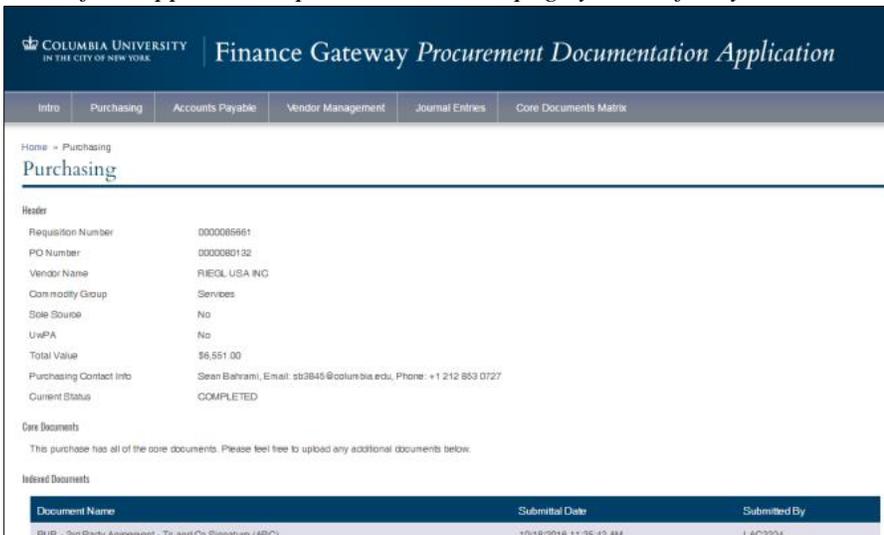
- An invoice showing the change
- Agreement or contract amendment
- Proposal or quote with details
- A memo that gives your explanation for the change

1. Click the **Procurement EDM** button.



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

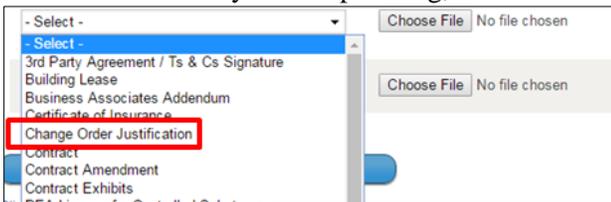
**Note:** If the application opens to the search page you can find your Purchase Order by entering the PO Number.



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.



**Saving and Submitting a Price/Quantity Change Order**

1. Click **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 tracked.

Unit COLUM PO ID 0000080132

Reason Code

Comment

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 Reason Code

SetID: CUSET

Reason Type: Procurement Change

Reason Code: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-14 of 14 Last

Reason Code	Description
ADDPOTERMS	Additional PO terms required after issuance
ADDTIME	Additional Time Required for Original Scope of Wor
ADDVALUE	Additional Value Required for Original Scope
CANCELPO	Cancel PO for performance issues
CANCNOFUND	Cancel PO due to non-availability of funding
CANFORCONV	Cancel purchase order for convenience
CLOSEDPO	Close PO due to completed scope of work
EXCHANGE	Cost Adjustment Due to Exchange Rate Change
LABORRATE	Add1 cost due to raw material/labor rate change
NEWGRANT	Add value due to new available grant/fund
NEXTPHASE	Next Phase(s) of a Multi-Phase Project
NEXTYEAR	Next Year in Multi Year Contract
SHIPTOL	Shipping & Handling Exceed AP Tolerance
TIMEVALUE	Additional Time Value Required for Original Scope

3. Select the appropriate Reason Code.
4. Type any additional **Comments**.

Reason Code Page

Enter a reason code and comment for making changes that are being tracked.

Unit COLUM PO ID 0000080132

Reason Code LABORRATE

Comment Add1 cost due to raw material/labor rate change

Use Same Reason Code

OK Cancel Refresh

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

Status Pend Appr

Budget Status Not Chkd

PO Reference



## 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

<https://columbia.service-now.com>