

PROCUREMENT SERVICES – CHANGE REQUEST INCREASE

PURPOSE

*Requesters will use this process to request increases on requisitions that have been sourced to Purchase Orders and dispatched. Increases can be done if (a) additional items are added to an existing purchase order, or (b) if additional funding needs to be added at a Blanket PO at the end of the year due to an unforeseen increase in purchases. **Prior to creating a change request, verify you have the necessary funds in the correct budget.***

Notes:

- a. If a change request is due to a change in scope of work, you must upload the new scope of work in the attachments of the requisition.*
- b. Increase requests are only necessary if your invoice exceeds 10% or \$500 (whichever is lesser) of the remaining PO value. You must have funds available in the budget line or you will get a budget error.*
- c. Shipping Line - Shipping can be added at the time of processing the voucher under the 'freight' section as long as funds are available in the budget line*
- d. Change Requests for increases will follow the same workflow as the original Requisition. For instance, if you create a purchase order on a grant, the change request will follow the original workflow through OSP. One exception is if you create a requisition under \$5,000 it will self approve, but if you increase the same Requisition and the total value goes over \$5,000, the change order will go through workflow instead of self approving.*

STEPS

1. Verify Encumbrance and Activity Summary on Purchase Order prior to making any changes. Navigation: **Purchasing>Purchase Orders> Review PO Information> Purchase Orders > Activity Summary**

PO Activity Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit: = ▾ EAGLE 🔍

PO Number: begins with ▾

Purchase Order Date: = ▾ 📅

Purchase Order Reference: begins with ▾

Vendor ID: begins with ▾ 🔍

Case Sensitive

Search Clear Basic Search 🔍 Save Search Criteria

Activity Summary

Business Unit: EAGLE PO Status: Dispatched

Purchase Order: 0000130874 Vendor: FISHER SCIENTIFIC COMPANY LLC

Merchandise Amount: 10.00 USD

Merchandise Receipt: 0.00 USD

Merchandise Returned: 0.00 USD

Merchandise Invoice: 0.00 USD

Merchandise Matched: 0.00 USD

Lines Personalize | Find | View All | 📄 | 📅 | First 1 of 1 Last

Details Receipt Invoice Matched RTV

Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1		Pipettes	EA	1.0000	10.0000	USD	<input checked="" type="checkbox"/>

- Navigation: **eProcurement > Manage Requisitions**. If you navigate to this page often, you can Add to Favorites for easy access.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000108495	0000108495	EAGLE	07/11/2019	PO(s) Dispatched	Valid	10.00 USD	<Select Action> Go

Requester: Stephen Quin Entered By: Stephen Quin Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

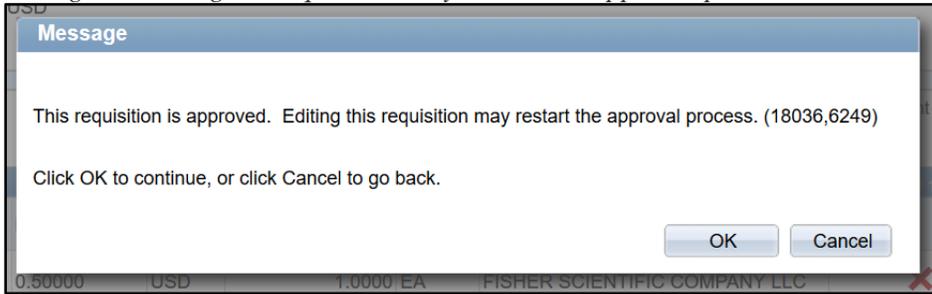
Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line	Description	Status	Price	Quantity	UOM	Vendor	
1	Pipettes	PO Dispatched	10.00000	USD	1.0000 EA	FISHER SCIENTIFIC COMPANY LLC	✖

- Search for the requisition you are looking to update. Status should be *PO(s) Dispatched*. Select the Pull down menu , then select Edit Requisition. Press Go. *You will receive a message*

stating that editing the requisition may restart the approval process. Press OK.



4. To increase the encumbrance on a Line, increase the Price for that line. Select any other changeable field to see the change reflected in the Total. Then, select Check Budget. Once your requisition has passed budget check (Increase amount is in Pre-Encumbrance), select "Save and Submit". *Please note: All requisitions are created as "Amount only", meaning once the PO is dispatched you cannot change the quantity on the PO. If you originally created a Requisition with a quantity greater than 1, you will need to calculate how much the Price must increase in order to have the Total be the correct amount. See endnote for example.*

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: EAGLE Boston College *Currency: USD
 Requester: QUIN Stephen Quin Priority: Medium
 Requisition Name: 0000108495

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Pipettes	FISHER SCIENTIFIC COMPANY LLC	1.0000	Each	10.00000	10.00
Total Amount:						10.00 USD
Pre-Encumbrance Balance:						0.000 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

5. Select CHGAMT as the reason code, and add in the description why you are completing a change request to increase the PO. Select OK to submit the Change Request.

Change Reason

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

Reason Code:

Comment:

Change in Amount increase PO by \$5.00 to order more pipettes on blanket.

Look Up Reason Code

SetID: SHARE

Reason Type: Procurement Change

Reason Code:

Description:

Search Results

View 100 First 1-8 of 8 Last

Reason Code	Description
CHGAMT	Change in Amount
CHGDEC	Decrease Amount
CHGEXTEND	Extend Dates
CHGQTY	Change in Quantity
DUEDATE	Due Date Change for Year End
OTHER	Other
WRONGVEND	Wrong Vendor Used
YEAREND	Close at year end

Confirmation

Requested For:	Stephen Quin	Number of Lines:	1
Requisition Name:	0000108495	Total Amount:	15.00 USD
Requisition ID:	0000108495	Pre-Encumbrance Balance:	5.00 USD
Business Unit:	EAGLE		
Status:	Approved		
Priority:	Medium		
Budget Status:	Valid		

Department Self-Approval

Requestion 0000108495: Approved [View/Hide Comments](#)

Department Self-Approval

Self Approved

Stephen Quin
Department Self-Approver
07/11/19 - 11:40 AM

Comment History

Endnote: Increasing a PO with a quantity greater than 1.

1. Go to the **Manage Requisitions** page and enter the **Edit Requisition Screen**. (see instructions above)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total
0000108499	Quantity greater than 1...	EAGLE	07/17/2019	PO(s) Dispatched	Valid	20.00 USD

Requester: Stephen Quin Entered By: Stephen Quin Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

Request Lifespan: Requisition → Approvals → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Line Information

Line	Description	Status	Price	Quantity	UOM	Vendor
1	pipettes	PO Dispatched	2.00000	10.0000	EA	FISHER SCIENTIFIC COMPANY LLC

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: EAGLE Boston College *Currency: USD
Requester: QUIN Stephen Quin Priority: Medium
Requisition Name: Quantity greater than 1 test

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	pipettes	FISHER SCIENTIFIC COMPANY LLC	10.0000	Each	2.00000	20.00

Total Amount: 20.00 USD
Pre-Encumbrance Balance: 0.000 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

Save & submit | Save & preview approvals | Cancel Changes

2. You originally created a requisition that has been dispatched to a PO for 10 pipettes at \$2.00 each. You are adding 5 more pipettes to the order, and will be ordering 15 pipettes at \$2.00 each. In **Edit Requisition**, the only cost related field you can change is **Price**, so you will need to calculate the new "price" for your requisition.

a. $\square\square\square\square = \square\square\square\square\square\square \times \square\square\square\square$

Originally, $20.00 = 10 \times 2.00$

Now, $30.00 = 15 \times 2.00$

To get the new Price, $30.00 = 10 \times \square\square\square\square$, solve for $\square\square\square\square = 3.00$

3. Change the Price field in the requisition line to the price you just solved for

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: EAGLE Boston College *Currency: USD
 Requester: QUIN Stephen Quin Priority: Medium
 Requisition Name: Quantity greater than 1 test Track Batch: 1

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	pipettes	FISHER SCIENTIFIC COMPANY LLC	10.0000	Each	3.00000	30.00

Total Amount: 30.00 USD
 Pre-Encumbrance Balance: 10.00 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Buttons: Check Budget, Save & submit, Save & preview approvals, Cancel Changes

4. Complete the change reason Comment to reflect the change you made.

Change Reason

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

Reason Code: CHGAMT

Comment: Buying 15 pipettes on this order.
 Changed price to reflect new total cost
 (15 x 2 = 30, 10 x 3 = 30).

OK

Look Up Reason Code

SetID: SHARE
 Reason Type: Procurement Change
 Reason Code: begins with
 Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

Reason Code	Description
CHGAMT	Change in Amount
CHGDEC	Decrease Amount
CHGEXTEND	Extend Dates
CHGQTY	Change in Quantity
DUEDATE	Due Date Change for Year End
OTHER	Other
WRONGVEND	Wrong Vendor Used
YEAREND	Close at year end

5. Budget Check, then **Save & Submit** the change request.

Confirmation

Requested For:	Stephen Quin	Number of Lines:	1
Requisition Name:	Quantity greater than 1 test	Total Amount:	30.00 USD
Requisition ID:	0000108499	Pre-Encumbrance Balance:	10.00 USD
Business Unit:	EAGLE		
Status:	Approved		
Priority:	Medium		
Budget Status:	Valid		

Department Self-Approval

Quantity greater than 1 test: **Approved** [View/Hide Comments](#)

Department Self-Approval

Self Approved

[Stephen Quin](#)

Department Self-Approver

07/17/19 - 2:51 PM

Comment History

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

[Approval History](#)