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 ha	ive and click Searc	ch. Leave fi	elds blank f	or a list of all va	lues.	
Find an Existing Value						
Search Criteria						
Business Unit:	= ~	EAGLE		Q		
PO Number:	begins with]		`		
Purchase Order Date:	= ~			31		
Purchase Order Reference	e: begins with ~					
Vendor ID:	begins with ~			Q		
Casa Sansitiva						
Activity Summary						
Business Unit:	EAGLE		PC	Status: Dis	spatched	
Purchase Order:	0000130874		Ve	ndor: FIS	SHER SCIENTIFIC C	OMPANY LLC
Merchandise Amount:	10.00 US	SD				
Merchandise Receipt:	0.00 US	SD				
Merchandise Returned:	0.00 US	SD				
Merchandise Invoice:	0.00 US	SD				
Merchandise Matched:	0.00 US	SD				
Lines				Personalize	Eind View All	THE First CI 1 of 1 12 Last
Details Receipt Invoice M	latched RTV	•				
Line Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1 💾	Pipettes	EA	1.0000	10.000	USD	

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

Reg	ID	Requisition Name	BU	Date	Status	Budget		Total				
00001	108495	0000108495	EAGLE	07/11/2019	PO(s) Dispat	ched Valid			10.00 USD	<select action=""></select>	~	Go
Reque: Pre-En	ester: ncumbran	Stephen Quin ice Balance:	Entered By: 0.00	Ste USD	phen Quin	Priority:	M	edium				
	*		A	6	2	1	82		A.		Egl	
B	Requisition	Approvals	Inventory	Purc Orc	<u>thase</u> ders	Change Request	Receiving	,	Returns	Invoice	Payment	-
Reques	st Lifespa	in:										
Line In	nformatio	n			_				Personalize	i End i 🗖 i 🧮 i	inst i of 1	Last
	Desc	ription	Status	Price		Quantity	UOM	Vendor				
Line	Desc	Contraction of the second s										

Search for the requisition you are looking to update. Status should be PO(s) Dispatched. Select the Pull down menu
Select Action> Go
Go
Go
Hen 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 Requisi	tion	2. Add Items a	Ind Services		3. Review and	Submit		
Review the details of your re	quisition, make any n	ecessary changes, and s	ubmit it for approval.					
Business Unit:	EAGLE Bost	on College			*Currency:	USD		
Requester:	QUIN		Stephen Quin		Priority:	Medium	\sim	
Requisition Name:	0000108495				-			
Requisition Lines 👔								
Line Description		Vendor Name	Quantity	UOM	Price	<u>e Total</u>		
🖹 🗌 1 🎲 <u>Pipettes</u>		FISHER SCIENTIFIC COMPANY LLC	1.0000	Each	10.0000	0 10.00		
Select All / Deselect /	<u>All</u>			ا Pre-Encumbra	otal Amount: nce Balance:	10.00 U 0.000 U	SD SD	
🖵 😓 🛛 Add to Favo	orites 🕓	Add to Template(s)	Modify	Line / Shipping / A	counting	Delete		
Commente 🙆							_	
Send to Vendor	Show at I	Receipt Sho	wn at Voucher		oval 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.

		Look Up Reason C	ode	×
			?!	Help
		SetID:	SHARE	
		Reason Type:	Procurement Change	
Change Reason		Reason Code: begins	with ~	
Enter a reason code a	nd comment for making changes that are be	Description: begins	with ~	
	the comment for making changes that are set			
Reason Code:	CHGAMT	Look Up Clear	Cancel Basic Lookup	
C	Change in Amount increase BO by	Search Results		
comment:	\$5.00 to order more pipettes on blanket.	View 100 Fir	st 💽 1-8 of 8 🕞 Last	
		Reason Code Descript	ion	
		CHGAMT Change	in Amount	
		CHGDEC Decreas	se Amount	
		CHGEXTEND Extend	Dates	
		CHGQTY Change	in Quantity	
		DUEDATE Due Da	te Change for Year End	
		OTHER Other		
OK		WRONGVEND Wrong V	/endor Used	
OK		TEAREND GOSE a	i year enu	
Requested For:	Stephen Quin	Number of Lines:		1
Pequisition Name:	0000108495	Total Amount:		15.00 USD
Requisition ID:	0000108495	Pre-Encumbrance Ba	lance:	5.00 1190
Business Unit:	FAGLE			
Status:	Approved			
Priority:	Medium			
Budget Status:	Valid			
Department Se	elf-Approval			
🗢 Requ	isition 0000108495:Approved	View/Hide Comments		
Department Se	elf-Approval			
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Stept	nen Quin			
Depar	tment Self-Approver			
07/11/	19 - 11:40 AM			
▷ Comme	nt History			
	-			
Submit	Edit Reguisition	Apply Approval Changes	Check Budget	
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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)**

Reg ID	Requisition Name	BU	Date	Status		Bedget	Total				
0000108499	Quantity greater than	1 EAGLE	07/17/2019	PO(s) Disc	atched	Valid		20.00 USD	Select Action>	~	Go
Requester:	Stephen Quin	Entered By:	: SM	ephen Quin	F	Priority:	Medium				
Pre-Encumbrance	e Balance:	0.0	DO USD								
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Description		90	Par	chase	Change	94	591 1	Determent		Desmant	2
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Line Descrip	tion	Status	Price		Quantity	UOM	Vendor	1000			
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dit Requisit	tion	PO Dispatched	2.00000	USD		10.0000 EA	FISHER	SCIENTIFIC	COMPANY LLC	X	
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- 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.
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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 $\square \square \square \square = 3.00$

-

2	Change the Price field in the requisition line to the price you just solved for
З.	Edit Pequicition

1. Define Requi	sition	2. Add Items a	nd Services	C,	3. Review and Submit		
Review the details of your	requisition, make any ne	cessary changes, and s	ubmit it for approval.	2			
Business Unit:	EAGLE Bosto	n College			*Currency:	USD	
lequester:	QUIN		Stephen Quin		Priority:	Medium	~
equisition Name:	Quantity greater the	in 1 test	Track Batch:	1			
equisition Lines 🔞							
Une Descriptio		Vendor Name	Quantity	UOM	- Price	t Is	otal
1 @ pipettes	FIS	HER SCIENTIFIC	10.00	000 Each	3.000	00 30	0.00
Select All / Deselect	LAII			Pre-Encum	Total Amount: brance Balance:	30.00 10.00	USD
Add to Fa	vorites	Add to Template(s)	Modify	Line / Shipping	/ Accounting	Delete	
omments 🔞							
Send to Vendor	Show at F	teceipt 🛛 Show	wn at Voucher		pproval Justification		
Check Budget							
		2 noview seconds	× Conce	Changes			

Look Up Basson Cos

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

		LOOK OP K	eason coue
			? Help
Change Reasor	1	SetID:	SHARE
		Reason Type	e: Procurement Change
Enter a reason code	and comment for making changes that are bei	ng tracked. Reason Cod	e: begins with ~
		Description:	begins with ~
Reason Code:	CHGAMT 🔍		
		Look Up	Clear Cancel Basic Lookup
Comment:	Buying 15 pipettes on this order.		
	Changed price to reflect new total cost	Search Re	esults
	(15 x 2 = 30, 10 x 3 = 30).	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
		WRONGVEN	D Wrong Vendor Used
OK		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	Total Amount:		30.00 USD
Requisition ID:	test 0000108499	Pre-Encumbrance Bala	nce:	10:00 USD
Business Unit:	EAGLE			
Status:	Approved			
Priority:	Medium			
Budget Status:	Valid			
C Quantity	y greater than 1 test:Appro	oved (> View/Hide Comments		
Self Approved Stephen 1 Departmer 07/17/19 -	d Ouin nt Self-Approver 2:51 PM			
Comment I	History			
Submit	Edit Requisition	Apply Approval Changes	Check Budget	
/iew.printable.version	Manage Requisitions	Create New Requisition		