### Purpose:
This manual outlines how to use the Change Request action to modify POs made for non-catalog items or services.

### Navigation:
(From the PO Page) Document Actions > Change Request

### Notes:
University users able to use and submit Requisition Forms can also submit Change Requests against POs to edit or update the information on the PO. Some changes may only be made by a Procurement Agent. All Change Requests must pass successfully through workflow approval before they will be executed.

### Steps

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<tr>
<th>Section Header</th>
<th>1 General Information</th>
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<tbody>
<tr>
<td>1.1</td>
<td>A Change Request is a separate document in the Bull Marketplace, just like a Requisition or a Purchase Order. It can be created against an existing PO by a user with the appropriate permissions, such as a Requestor or Approver. Change Requests are searchable in the Document Search fly-out.</td>
</tr>
<tr>
<td>1.2</td>
<td>Change Requests are only allowed against POs created for non-catalog orders – in other words, POs created with the Requisition Form and that start with the letter “P.” Change Requests against Punch Out orders will be rejected. If a user needs to make a change to these orders, they will need to work with the supplier outside of the system (for quantity, price, or item issues) or in FAST (for budget or chartfield issues).</td>
</tr>
<tr>
<td>1.3</td>
<td>The option to create a Change Request is only available for POs in a “Completed” workflow status. If a PO is stuck in a “Pending” status due to an error, contact Procurement Services.</td>
</tr>
<tr>
<td>1.4</td>
<td>Workflow approval is initiated after a Change Request is submitted. If the chartfields, PO Business Unit, or commodity codes have changed, the workflow will be adjusted accordingly.</td>
</tr>
<tr>
<td>1.5</td>
<td>If a change is being made to the items, prices, or quantities of a PO’s lines, the user must attach an updated quote or invoice to explain the changes. If increasing a line will bypass a price threshold, competitive quotes must be added to the Requisition Form.</td>
</tr>
<tr>
<td>1.6</td>
<td>By default, revised POs will re-distribute to suppliers. Users have the option to NOT send an updated version of the PO to a supplier after the PO is revised. However, if price, quantity, or line descriptions have changed, an explanation for not doing so will be required.</td>
</tr>
<tr>
<td>1.7</td>
<td>Change Requests cannot be made against a PO which has been closed or cancelled.</td>
</tr>
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</table>
Change Requests and PO Revisions

Steps

Section Header

2

Initiating a Change Request

2.1 The user should navigate to the PO that they wish to change. In this example, I am using a non-catalog PO and a user who has the Requestor role. The PO is in Completed workflow status.

2.2 On the PO page, select Change Request from the Document Actions pull-down on the upper-right hand corner of the page.

2.3 Before the Change Request draft form is created, the user has the opportunity to inform specific users of the request, put in comments, and add relevant attachments.

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notifications:

- Constance Andrews (Approved Requisition) <constance.andrews@gmail.com>
- Jay Donahoe (Prepared by, Prepared for) <jdonahoe.cs@gmail.com>
- Julie McCoy (Approved Requisition) <julie.mccoy@gmail.com>
- add email recipient...

User with change request permission:

- Abhishek Yadav (Approved) <abhishek.yadav@gmail.com>
- Donna Washington (Approved) <donna.washington@gmail.com>
- Maria Trujillo (Prepared) <mtrujillo.cs@gmail.com>
- Michael Oliva (Approved) <michael.oliva@issnewyork.com>
- Telia Williams (Approved) <ttelia.cs@gmail.com>
- add email recipient...

Attachments:

- Attach file to this change request (optional)
  - Attachment Type: File
  - File Name:
  - File: [Browse...]

a. While it is not required to email users, it can be useful to do so if they are involved in the order but not part of the workflow. All USF users with access to the Bull Marketplace should show up as potential email recipients.
Steps | Section Header
--- | ---

b. The comment field is EXTREMELY important. This space should outline the exact changes the user plans to request. In case the change is for something that the user cannot do directly, they need to inform the Procurement Agent what change must be made.

c. Attachments can be anything deemed relevant to the Change Request. All attachments will be viewable by any user with access to the PO/Change Request later. If there are new quotes or invoices to justify a price increase, they should be added to the Requisition Form directly, not necessarily here.

3.1 Change Request – Increasing, decreasing, and/or changing the description of a line

No matter what change the user is requesting, the Change Request comment should outline it in detail. Any edits will be documented in the Change Request history, but it helps ensure the desired changes were performed by describing them in this comment.

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This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

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- Donna Washington (Approved) <tsmusf+sq@gmail.com>
- Maria Trujillo (Approved) <tsmusf+sq@gmail.com>
- Michael Olive (Approved) <michael.olive@risenow.com>
- Tela Williams (Approved) <tsmusf+sq@gmail.com>
- Marcus Rodriguez <tsmusf+sq@gmail.com>
- add email recipient...

Change Request:
- Line 1: Increase quantity from 1 to 2.
- Line 2: Decrease price from 5 to 4
- Line 4: Decrease quantity from 3 to 2
- Line 6: Increase price from 3.25 to 3.99
- Line 7: Change description from "Flange" to "Flange"

776 characters remaining

Attach file to this change request (optional):
- Attachment Type: File
- File Name: Updated Quote
- File: Browse... Updated Quote Example.pdf

Create Change Request Close

3.2 In this particular case, changes to several lines will be performed. The user has also selected another user to be notified of these changes.
3.3 As unit price and quantity are being increased, a new quote with the corrected numbers has been uploaded. This should also be in the Requisition Form, but this will help clarify the desired changes.

3.4 After the Change Request is created, the user will be brought to the document. This looks very similar to the PO itself, but it allows users to edit the information within it.

3.5 In this example, all changes are being done to the line values of the PO. As such, the Requisition Form will need to be updated.Scrolling down, the user can review the lines and select the Requisition Form attached.

a. Users may select the Requisition Form from either the top of the Lines section, or under each item. If multiple Forms have been used (for orders with a high number of line items), they will need to make sure to select the correct form to edit.
3.6 Selecting the Requisition Form will take the user back to an editable version of the Form, where they may freely update the Line Information.

The user should make all relevant changes to each line, as per the comment they originally submitted before creating the Change Request.
### Change Requests and PO Revisions

#### Section Header

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<td>3.8</td>
<td>After making these changes, the user should select “Save Progress” at the bottom of the page:</td>
</tr>
<tr>
<td>3.9</td>
<td>After saving progress, the user must return to the top of the screen and choose “Return to Change Request.” <strong>DO NOT PROCEED TO ‘REVIEW AND SUBMIT.’</strong> Doing so will add the form to your Active Cart – not to the Change Request!</td>
</tr>
<tr>
<td>3.10</td>
<td>Back on the Change Request page, the user can review the approval workflow to see what approvals will be required. If everything is in order, the user can submit the request by selecting the green button at the top of the screen that says “Submit Request.”</td>
</tr>
<tr>
<td>3.11</td>
<td>After the Change Request is approved, the changes will show in the PO’s history.</td>
</tr>
</tbody>
</table>
3.12 The PO itself will show a new Revision number, indicating that it has been modified.

Purchase Order:
P000000299 Revision 1
2976732

Supplier: FISHER SCIENTIFIC
Status: Completed
Document Total: 350.21 USD

4 Change Request – Changing the commodity code or chartfield for a line

4.1 No matter what change the user is requesting, the Change Request comment should outline it in detail. Any edits will be documented in the Change Request history, but it helps ensure the desired changes were performed by describing them in this comment.
4.2 In this particular case, the commodity code for line 1 and the chartfield string for line 2 will be changed.

4.3 Although the workflow approval rules should ensure that new chartfield approvers will review the change, it is best practice to attach documentation showing the new chartfield approver is aware of the change.
Steps

4.4 The first change, of the commodity code, can be made either on the line of the requisition or within the Requisition Form at the bottom of the Summary section. The second change, of the chartfield, can be made at the line level in the Account Codes section. Because neither change is relevant to the supplier fulfilling the order, a comment can be made requesting that the revised PO not be sent back out (only Procurement Agents may change this setting).

4.5 Scrolling down to the bottom of the Summary page, the user can update the commodity code either within the Requisition Form, or directly on the line using the Edit button.

- Within the Requisition Form, the user would navigate to the Line Information section and modify the commodity code for line 1.
### Change Requests and PO Revisions

**Steps**

<table>
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<th>Requisition Form</th>
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<td>Instructions</td>
<td>How many lines will be on your requisition?</td>
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<tr>
<td>Suppliers</td>
<td>Purchased Request On/Document</td>
</tr>
<tr>
<td>Form Fields</td>
<td>Instructions</td>
</tr>
<tr>
<td>Revision Information</td>
<td>How many lines will be on your requisition?</td>
</tr>
</tbody>
</table>

b. After making the changes, the user should save the Form and select to “Back to Change Request” in the upper left-hand corner of the screen. It is extremely important that the user does not go to the Review and Submit section and add the Form to their cart, as this will initiate a new order!

4.6 Alternatively, the user can edit the commodity code on the line by using the “Edit” button. Changing the code here will also update the Form.
4.7 To change the chartfield for line 2, the user should navigate to the Accounting Codes section. Each line will have an edit button that will allow the user to update the chartfield string.

4.8 After updating the chartfield string, workflow approvals will change accordingly. These can be viewed in the Change Request Approvals section.

4.9 Finally, a comment should be made requesting Procurement Services to not send a revised PO out to the supplier, as the changes made affect only internal budgeting considerations. Comments can be added in a variety of ways. The original comment on the Change Request creates a comment on the document. In the Comments section, a user may add a new comment by selecting one of the options highlighted, or they can reply to an existing comment. A user can also add a comment from the Document Actions pull-down menu at the top right-hand side of the page.
4.10 After all the changes are made, the Change Request may be submitted. It will flow through workflow based on the updated chartfield string. When a Procurement Agent reviews the Change Request, they may assign it to themselves to make changes to the revised PO distribution (as per the comment).

4.11 After being approved, the PO is updated with a new Revision number. Checking the History link allows a review of which changes were made, and confirms the revised PO was not resent to the supplier.

**Purchase Order:**

**P000000301 Revision 1**

2978578
Change Requests and PO Revisions

5  Change Request – Cancelling Purchase Order Lines (or the entire order)

5.1 Purchase Orders lines can be cancelled only when no items have been received or invoiced. If an order has been partly fulfilled, please refer to the section on closing a Purchase Order instead. If all lines of a PO are cancelled, the entire PO will be considered cancelled.

5.2 If a user is requesting a cancellation, the revised PO must be resent to the supplier. This will ensure that the order will not be filled later on. The only exception is if the original PO was not sent to the supplier.

5.3 Once a cancellation Change Request is processed and the revised PO is exported to FAST, the line(s) cannot be reopened again. If the PO still has other open lines a new Change Request can be processed in the Bull Marketplace, but any attempts to change the cancelled line will fail to update. Cancellation is a permanent status in FAST. If a user needs to pay for the order after the cancellation has occurred, they will need to create a new requisition and PO.

5.4 No matter what change the user is requesting, the Change Request comment should outline it in detail. Any edits will be documented in the Change Request history, but it helps ensure the desired changes were performed by describing them in this comment.
5.5 To cancel a line, first scroll down in the Summary section of the Change Request to get to the lines, then navigate to the Requisition Form for that line.
Steps

5.6 In the Requisition Form, navigate to the Line Information page and reduce the quantity to 0. Once this is complete, push the green “Save Progress” button down at the bottom. Remember: only a line without any receipts or invoices may be cancelled. If a receipt or invoice is applied against that line, they must be deleted first.
### Section Header

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<th>Steps</th>
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</thead>
<tbody>
<tr>
<td><strong>5.7</strong></td>
</tr>
</tbody>
</table>

5.7 After making the changes, the user should save the Form and select to “Back to Change Request” in the upper left-hand corner of the screen. It is extremely important that the user does not go to the Review and Submit section and add the Form to their cart, as this will initiate a new order!

5.8 The second line will no longer show in the Lines section. The Change Request can now be submitted in Approval Workflow. A revised copy should be sent to the supplier.
5.9 Once the Change Request passes its approvals, the PO will be revised to show that line 2 has been cancelled. This will also cancel the line in FAST and release the encumbrance.

5.10 To entirely cancel a PO*, a Procurement Agent must choose to cancel the entire order themselves. If all lines must be cancelled, submit a change request with the comment stating as such. After going through approvals, a Procurement Agent will manually cancel the order and send the cancellation notice to the supplier. The PO itself will show as “cancelled” when searched for.

*Note: a complete cancellation can only be done when NO lines have been receipted or invoiced. If any have, the user must cancel the other lines by reducing their quantities to 0. If any partially fulfilled lines must also be closed, please refer to the section on the closing process.

6 Change Request – Closing a Partially Fulfilled Line (or the Rest of a Partially Fulfilled Order)

6.1 If a line has been partially fulfilled – either received or invoiced against – it can no longer be cancelled. Lines may only be closed unless all receipts or invoices are deleted.

6.2 If the line is not matched (but only partially received or partially invoiced), the encumbrance can be reduced to the partial amount. However, the line will not actually close until the amount is matched and payment is distributed. Once this happens, the line will automatically close.
### Steps

<table>
<thead>
<tr>
<th>6.3</th>
<th>After a PO has been fully closed out and the updates have been sent to FAST, the lines may no longer be opened. If additional items must be purchased or paid for, they must be entered on a new Purchase Order.</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.4</td>
<td>To close a line, the quantity of the line must be reduced to the amount that has been fulfilled. If the line is partially matched, this will flip the status to fully matched, which will close the line after the matched portion has been paid. Even before that point, the line will unencumber the unfulfilled amount.</td>
</tr>
<tr>
<td>6.5</td>
<td>No matter what change the user is requesting, the Change Request comment should outline it in detail. Any edits will be documented in the Change Request history, but it helps ensure the desired changes were performed by describing them in this comment.</td>
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  - Robert Robinson (Approved Requisition) <tsmusf+sq@gmail.com>
  - Shannon Ward (Prepared by, Prepared for) <tsmusf+sq@gmail.com>
  - add email recipient...

- **User with change request permission:**
  - Abhishek Yadav (Approved) <tsmusf+sq@gmail.com>
  - Donna Washington (Approved) <tsmusf+sq@gmail.com>
  - Maria Trujillo (Approved) <tsmusf+sq@gmail.com>
  - Michael Olive (Approved) <michael.olive@risenow.com>
  - Tela Williams (Approved) <tsmusf+sq@gmail.com>
  - add email recipient...

**Reduce quantity on line 1 from 10 to 5. We have already received 5, and no more items will be ordered.**

697 characters remaining

- **6.6** In this example, the PO has three lines. Line 1 has a quantity of 10, and 5 have been received and invoices (partially matched). Reducing the quantity of line 1 from 10 to 5 will unencumber the funding for those five remaining items, and flip the line from partially matched to fully matched. Once payment is disbursed, the line will automatically close. Note that since line 3 has no invoices or receipts on it yet, reducing its quantity to 0 would cancel that line. (This image is from the PO Status page).
6.7 On the Change Order, navigate to the lines at the bottom of the Summary section and select the Requisition Form for line 1. You will see that despite there being a quantity of 10 on the PO line, the change order line only shows a quantity of 5, as this is all that is remaining unmatched.

Line 2, despite having an invoice for 5 against it, still shows 5 available for editing. If we reduced the quantity on line 2, however, it will cause an error with matching once a receipt is made. Do not reduce a quantity below what has been received or invoiced!

6.8 In the Requisition Form, navigate to the Line Information section. Note that, despite the Change Request line showing line 1 having a quantity of 5 (the unmatched quantity), the Requisition Form still properly shows the quantity as 10. Reduce this quantity to the desired amount: 5.
6.9 After saving your changes with the green “Save Progress” button at the bottom of the Form, select “Back to Change Request” in the upper-left hand corner of the Form. Do not proceed to the Review page and add this to your cart, as it will create a new order!

6.10 Submit your Change Request to workflow approval. The updated PO should be resent to the supplier so they know not to fulfill the rest of the order. If this should not be resent, make sure you include that information in your Change Request comment, along with an explanation as to why.

6.11 After workflow has been completed, the PO will be revised with the updated amount. Line 1 will have switched from “partially matched” to “fully matched,” and will close out after FAST pays the matched portion of the line.
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</thead>
<tbody>
<tr>
<td>7</td>
<td>Change Request - Adding Lines to a Purchase Order</td>
</tr>
</tbody>
</table>
| 7.1   | Right now, this functionality is experiencing an error when the PO attempts to revise itself after workflow is approved. As such, **for the time being we will not be allowing additional lines on existing Purchase Orders created in the Bull Marketplace.** There is a scheduled bug fix for this which we will begin testing in mid-October, with a planned release in November. Until then, a new order should be created for additional lines. The Notes & Attachments sections of the requisition can be used to link the lines to an existing order (External Notes would be used if the supplier should be informed).

| 8     | Changes to Purchase Orders created in FAST |
| 8.1   | The Bull Marketplace will not move Purchase Orders created prior to our Go-Live date from FAST into the new system. As such, any changes to existing POs will still use the old paper PO form, which should be filled out, signed, and emailed to Procurement Services (ideally to the Procurement Agent who approved your original PO). We will not be allowing additional lines to be added to these POs, as users will no longer be able to enter requisitions in FAST directly. We will gradually be phasing these orders out over time, as all ordering should be done through the Bull Marketplace going forward. The old paper form may be found [on our website under the Forms section](#). Please note that this form will NOT be accepted for changes to be done to POs created in the Bull Marketplace. The processes outlined above must be followed instead. |