FIN: Editing Purchase Orders and Creating Change Orders

Overview

This document explains how buyers can find, edit, issue, cancel, and close individual lines of purchase orders (POs); create change orders; and amend supplier contracts.

When determining the appropriate process for making revisions to a PO, consider the following:

- POs can be edited when their status is **Draft, In Progress,** or **Approved.** The **Edit** function allows for the revision of all PO data.
- Once a PO has moved into **Issued** status, it can no longer be edited. Any changes to the lines of the PO require a **Change Order**.
- After the PO has been issued, the **Edit Purchase Order Without Change Order** function allows for changes to only Header information (e.g., PO Type, Payment Terms, Buyer, Contact Information) on the PO, or the Deliver To/Ship To information on the lines of the PO.
- The **Cancel** function will cancel the PO and reopen the requisition for sourcing.
- Closing the PO or closing the PO line will close the PO and the requisition and relieve all encumbrances.
- For information about closing POs, please refer to the Procurement Events job aid.

Note: If the wrong supplier was selected and the PO was issued, the PO must be canceled to issue a new PO to the correct supplier.

Recommendations:

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- None.

Icons Referred to in This Document

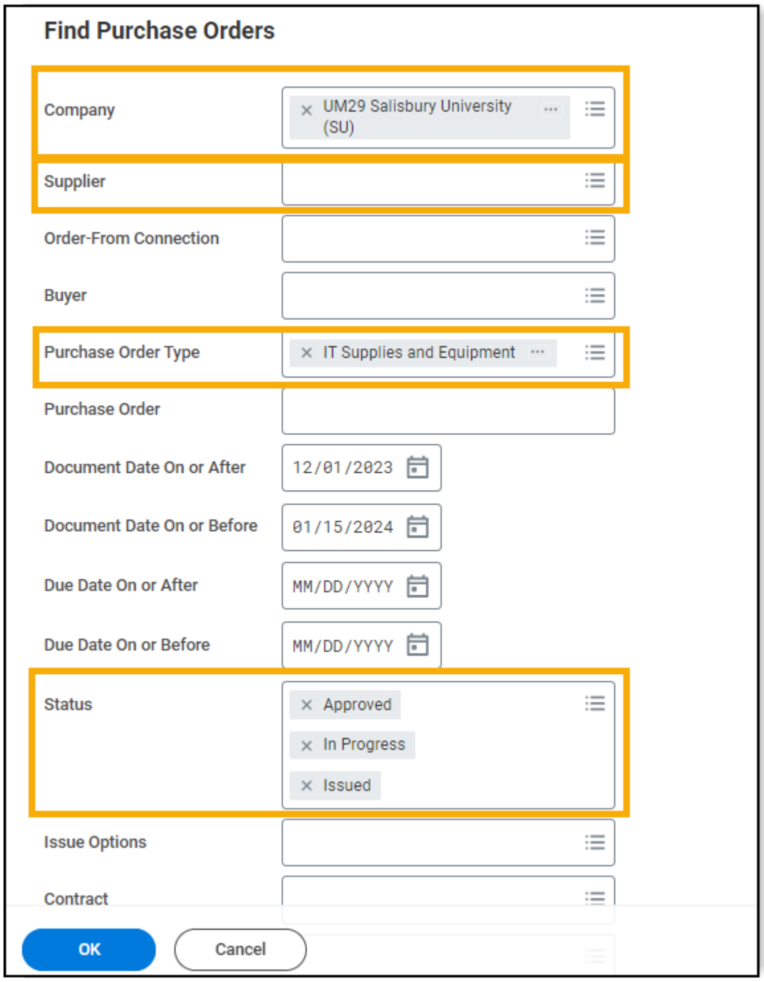
Required Field	Add Row	Prompt	Related Actions
Calendar	Check Box		

Find Purchase Order

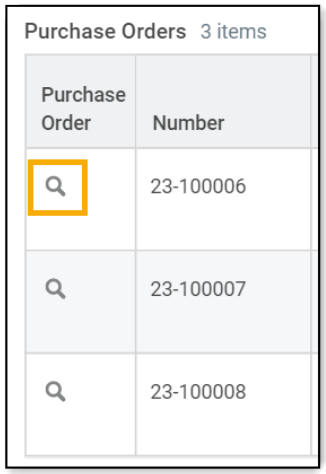
1. Enter ***Find Purchase Orders*** in **Search** bar and select the report.

2. The Find Purchase Order pop up displays.
3. Use the **Company Prompt** and select your institution.
4. (Optional) Fill in the remaining fields as necessary to limit the Purchase Orders found in the report.

   Note: You can leave all report prompts blank and select OK to pull all current Purchase Orders.



5. Select **OK**.
6. The Find Purchase Orders report displays.
7. Select the **Magnifying Glass** to see details on the purchase order.



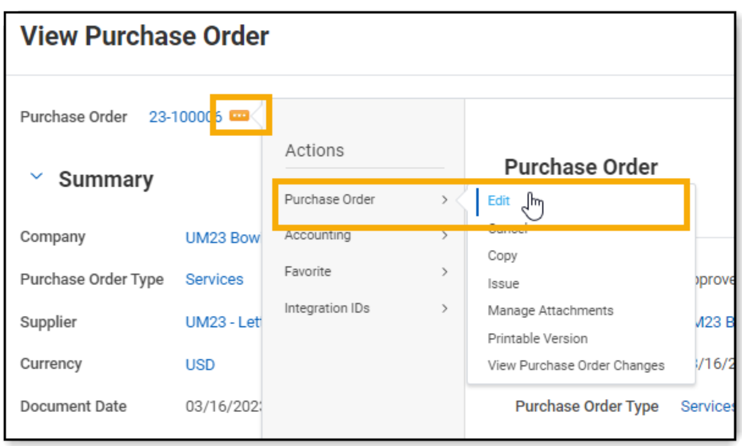
8. The Purchase Order displays.

   Note: You can check the status of the Purchase Order and select **related actions** next to the Purchase Order number by hovering over the Purchase Order number and selecting the following: edit, cancel, and issue Purchase Order.

Edit Purchase Order

1. Enter the specific ***Purchase Order*** Number in the **Search** bar and select the Purchase Order.

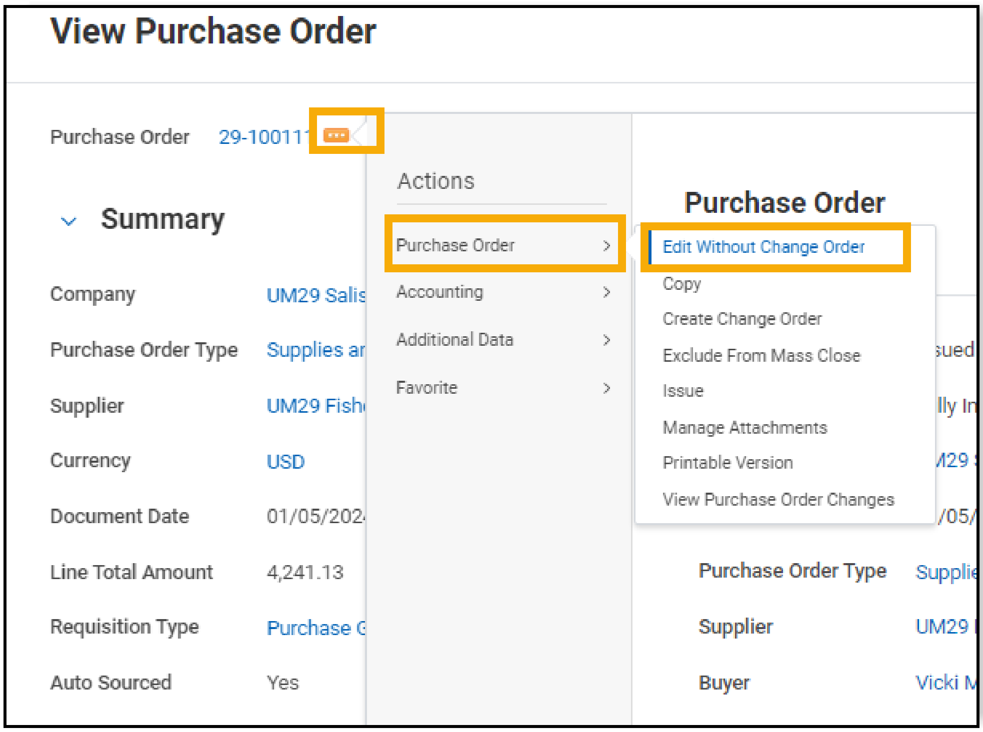
   Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order number, choose **Purchase Order,** then select **Edit.**



4. The Edit Purchase Order page displays.
5. Review and edit the PO data as needed.
6. Select **Submit**.

Edit Purchase Order without Change Order

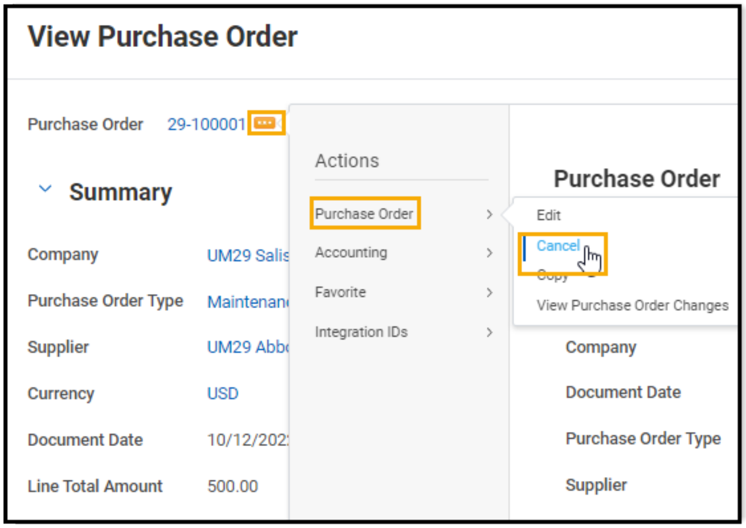
1. Enter the specific ***Purchase Order*** Number in the **Search** bar and select the Purchase Order.
   Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order number, choose **Purchase Order,** then select **Edit without Change Order**.



4. The Edit Purchase Order page displays.
5. Review and edit the PO data as needed.
6. Select **Submit**.

Cancel Purchase Order

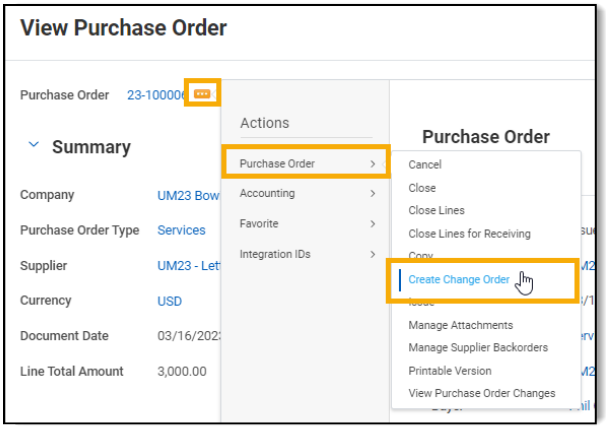
1. Enter the specific ***Purchase Order Number*** in the **Search** bar and select the Purchase Order.
   Note: If you do not know the Purchase order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order name.
4. Select **Purchase Order** under **Actions** and choose **Cancel**.



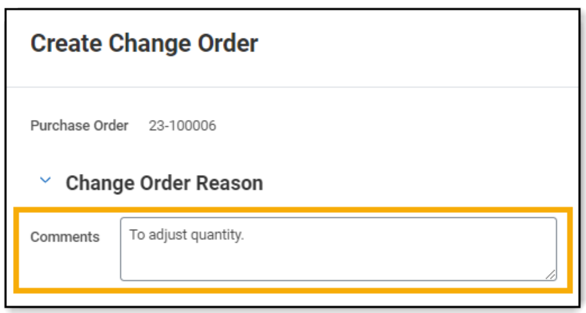
5. The Cancel Purchase Order page displays.
6. Review the following information on the Cancel Order Page.
7. Select **OK**.

Change Order

1. Enter the specific ***Purchase Order Number*** in the **Search** bar and select the Purchase Order.
   Note: If you do not know the Purchase number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** by hovering over the purchase order name.
4. Select **Purchase Order** under Actions and choose **Create Change Order**.



5. The Change Order Reason page displays.
6. Under Change Order Reason enter ***Comments***.



7. Apply edits accordingly on the Create Change Order page.
8. Select **Submit**.

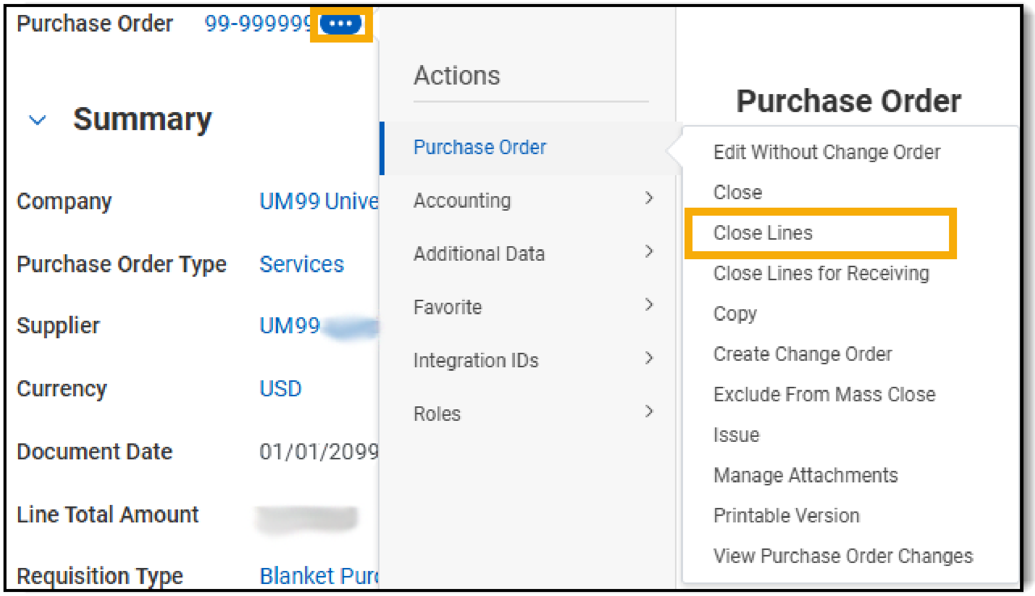
Notes:

- Change Orders will route for Budget Check if the Purchase Order Value was modified.
- You will receive a notification of approval or denial.
- Once you receive approval, you must **Issue** the Purchase Order again.

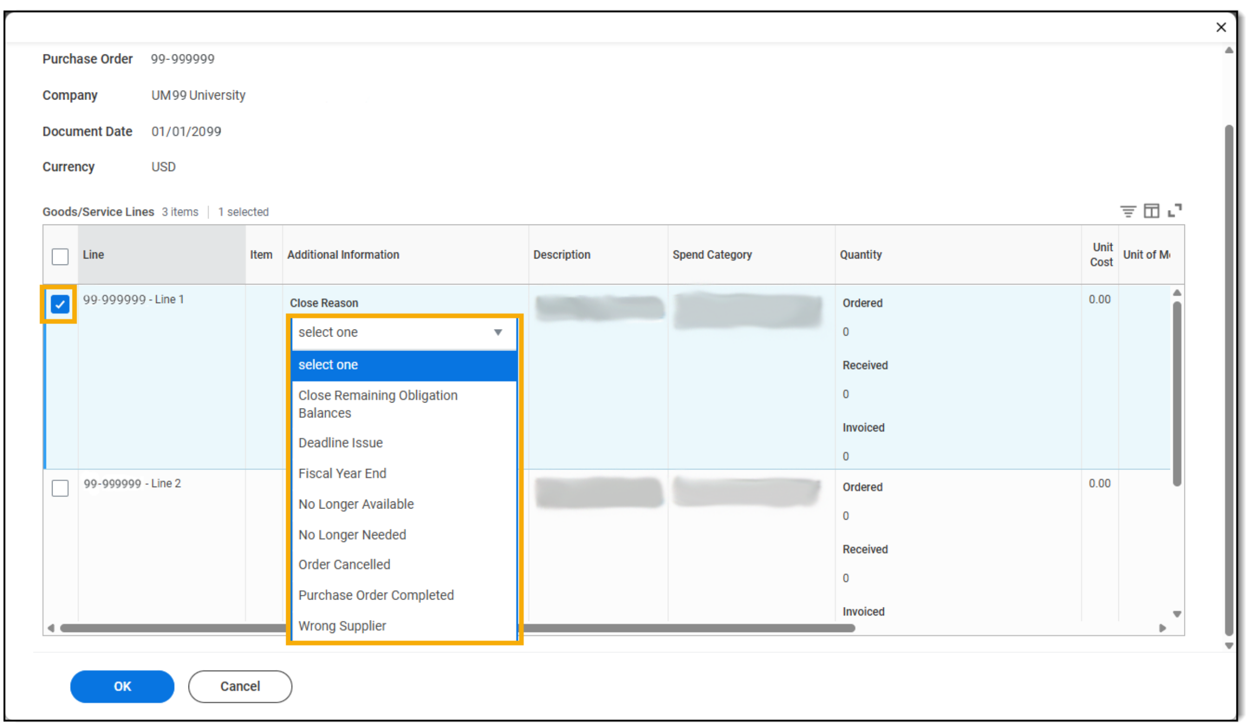
Close Lines

1. Enter the specific ***Purchase Order*** Number in the **Search** bar and select the Purchase Order.

   Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** next to the Purchase Order number, choose **Purchase Order,** then select **Close Lines.**



4. The Close Lines page displays.
5. Use the **check box** to select a Purchase Order line to close.
6. Use the **Close Reason prompt** and select the appropriate reason for closing the line.
7. Repeat steps 5 and 6 for each line requiring closure.
8. Select **OK.**



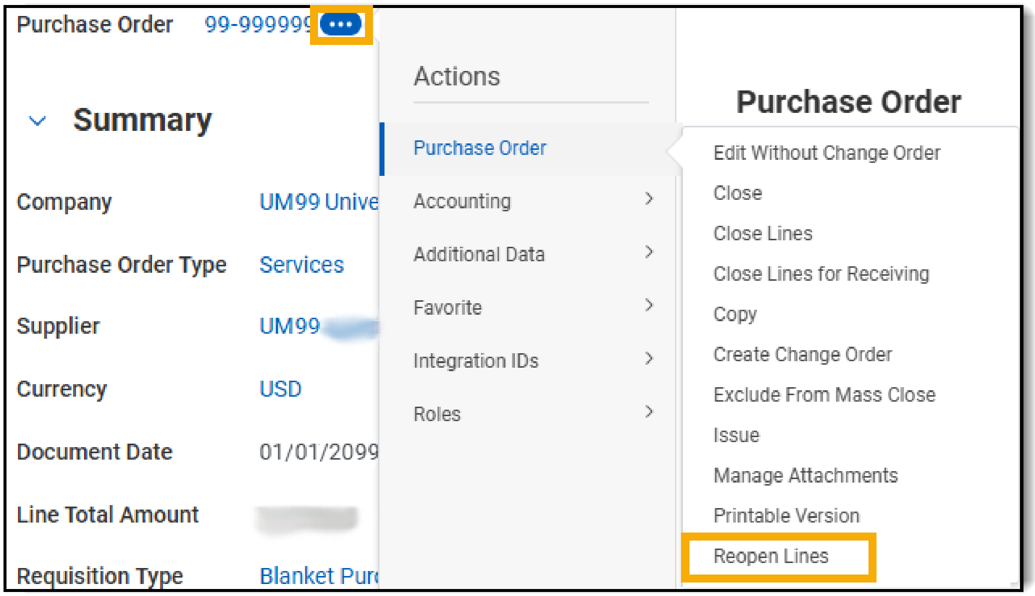
9. Select **Done.**

Note: The Purchase Order now displays the line as Closed in the Status field.

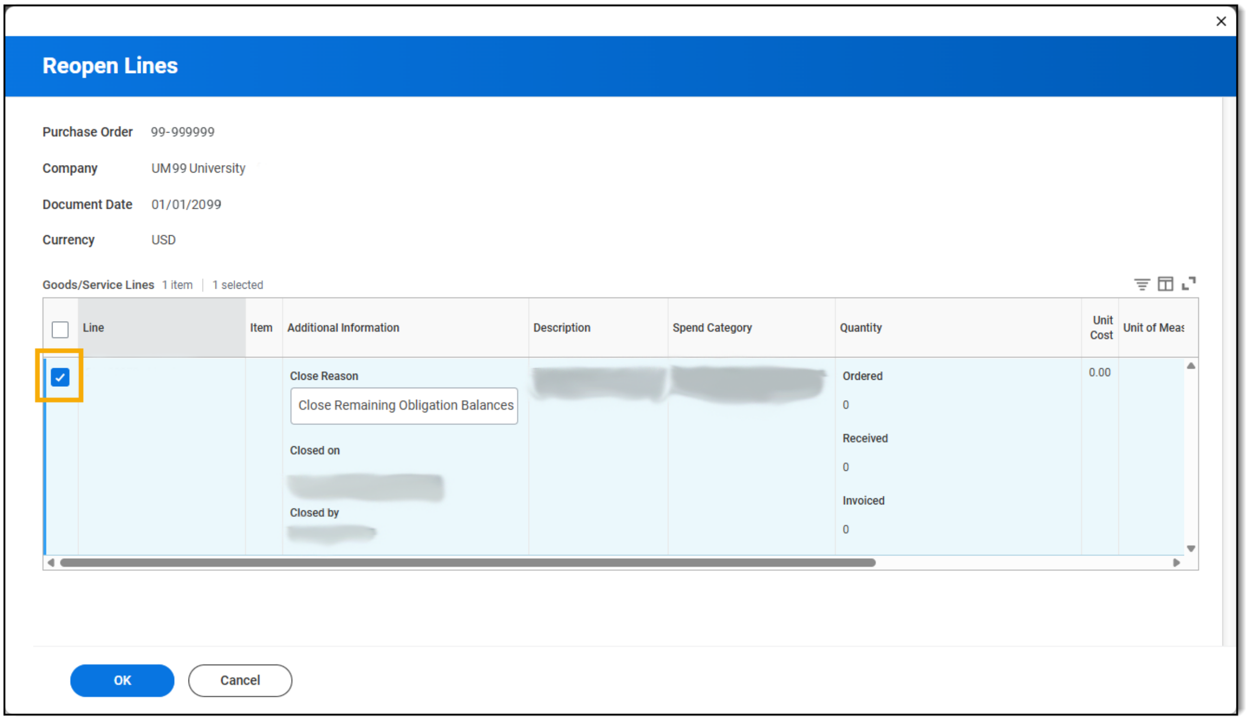
Reopen Line

1. Enter the specific ***Purchase Order*** Number in the **Search** bar and select the Purchase Order.

   Note: If you do not know the Purchase Order number, use the Find Purchase Orders report.
2. The View Purchase Order page displays.
3. Select **Related Actions** next to the Purchase Order number, choose **Purchase Order,** then select **Reopen Lines.**



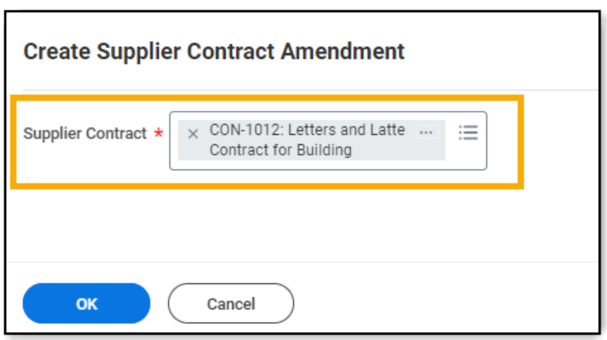
4. The Reopen Lines page displays.
5. Use the **check box(es)** to select the line(s) to reopen.
6. Select **OK.**



7. Select **Done.**

Create Supplier Contract Amendment

1. Enter ***Create Supplier Contract Amendment*** in the **Search** bar and select the task.
2. The Create Supplier Contract Amendment popup displays.
3. **Supplier Contract**: use the **Prompt** to select the **Supplier Contract**.



4. Select **OK**.
5. The Create Supplier Contract Amendment page displays.
6. Fill in the following fields under the **Amendment Information** section:

   a. **Amendment Type**: use the **Prompt** to select **Amendment Type**.
   b. **Amendment Date**: auto populates.
   c. **Amendment Number**: enter the ***Amendment Number***.
7. Enter or edit the **Supplier Contract Details** as needed on the Create Supplier Contract Amendment page.
   Note: Some fields will be automatically populated with the original supplier contract details.
8. Select **Submit**.