



# Business Process Document

## PS FIN Purchasing: Entering Requisition Change Orders

<b>Department</b>	
<b>Responsibility/Role</b>	
<b>File Name</b>	Entering Requisition Change Orders_BUSPROC.doc
<b>Version</b>	
<b>Document Generation Date</b>	8/12/2009
<b>Date Modified</b>	8/12/2009
<b>Last Changed by</b>	
<b>Status</b>	

### Entering Requisition Change Orders

Trigger:

Required Field(s)	Comments

Output - Results	Comments

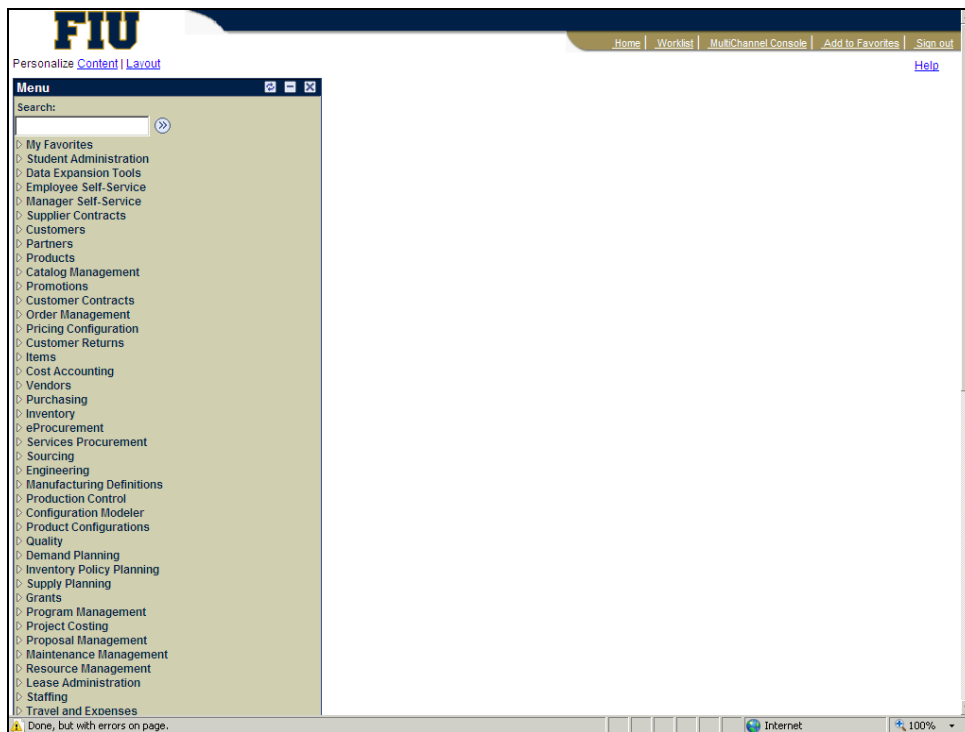
### Additional Information

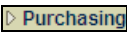
### Procedure

You can enter and track requisition change orders for approved requisitions, sourced requisitions, or requisitions having a budget check status of Valid. With PantherSoft Purchasing, you create change orders online using the requisition pages.

You can still make changes to a requisition after the purchase order has been created. You can't decrease quantities with a requisition change order, only increase quantities.

In this topic, you are going to create a change order to make changes to the quantity for an existing Purchase Order.



Step	Action
1.	Click the <b>Purchasing</b> link. 



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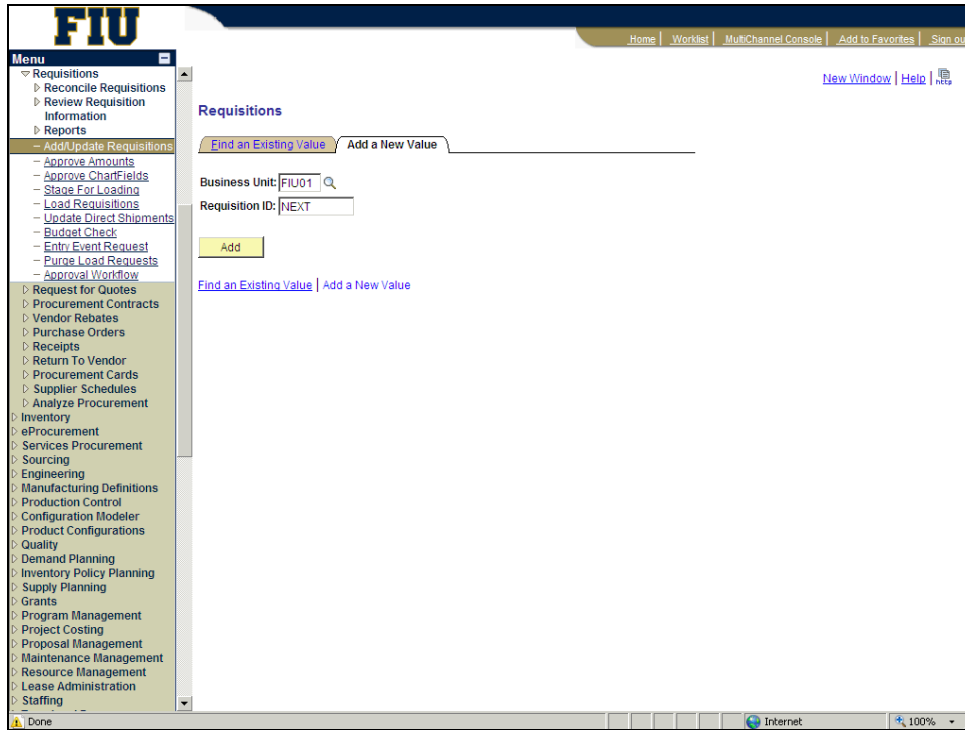
## PS FIN Purchasing: Entering Requisition Change Orders




Step	Action
2.	Click the <b>Requisitions</b> link. <a href="#">Requisitions</a>
3.	Click the <b>Add/Update Requisitions</b> link. <a href="#">Add/Update Requisitions</a>

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## PS FIN Purchasing: Entering Requisition Change Orders





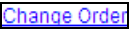
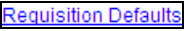


Step	Action
4.	Click the <b>Add</b> button. 



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Step	Action
5.	Click the <b>Look up Requester (Alt+5)</b> button. 
6.	Enter the desired information into the <b>Requester</b> field. Enter " <b>2345704</b> ".
7.	Click the <b>Look Up</b> button. 
8.	Click an entry in the <b>Name</b> column. 
9.	Click the <b>Look up Origin (Alt+5)</b> button. 
10.	Click an entry in the <b>Description</b> column. 
11.	Click the <b>Requisition Defaults</b> link. 

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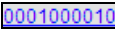
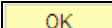


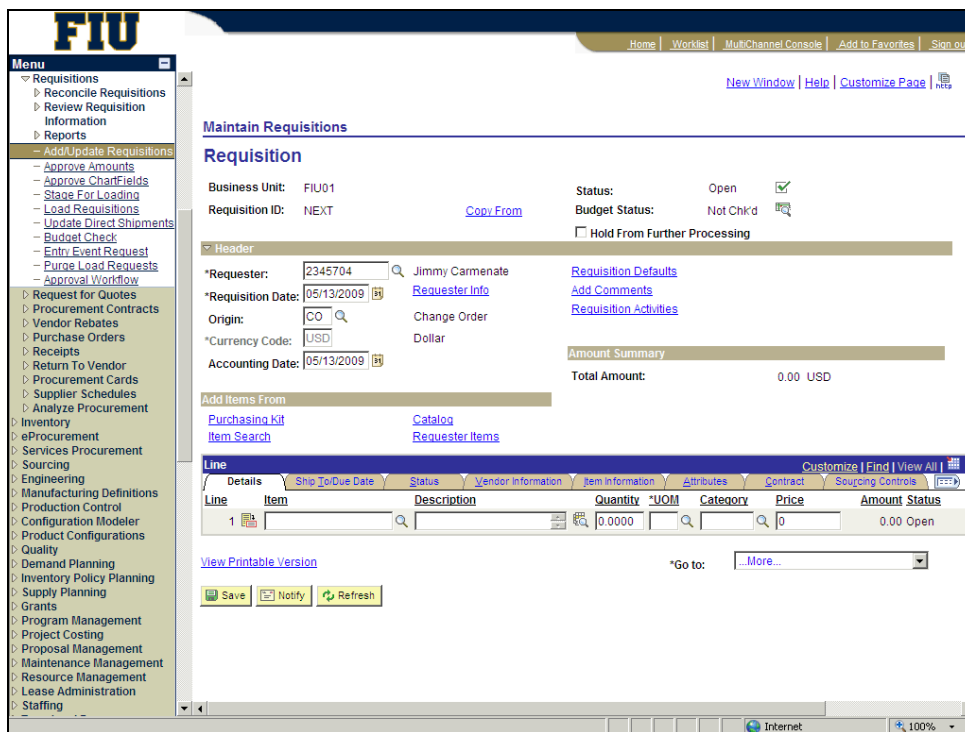
Step	Action
12.	Click the <b>Override</b> option. 
13.	Click the <b>Look up Vendor (Alt+5)</b> button. 
14.	Enter the desired information into the <b>Short Vendor Name</b> field. Enter " <b>DELL</b> ".
15.	Click the <b>Look Up</b> button. 
16.	Click an entry in the <b>Short Vendor Name</b> column. 
17.	Click the <b>Look up Ship To (Alt+5)</b> button. 
18.	Click an entry in the <b>Ship To Location</b> column. 
19.	Click the <b>Look up SpeedChart (Alt+5)</b> button. 
20.	Enter the desired information into the <b>SpeedChart Key</b> field. Enter " <b>144000102</b> ".



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Step	Action
21.	Click the <b>Look Up</b> button. 
22.	Click an entry in the <b>SpeedChart Key</b> column. 
23.	Click the <b>Horizontal</b> scrollbar.
24.	Click the <b>Location</b> button. 
25.	Click an entry in the <b>Location Code</b> column. 
26.	Click the <b>Horizontal</b> scrollbar.
27.	Click the <b>OK</b> button. 




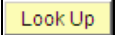


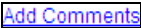


Step	Action
28.	Enter the desired information into the <b>Description</b> field. Enter " <b>CO to PO 0000041578</b> ".
29.	Enter the desired information into the <b>Quantity</b> field. Enter " <b>20.00</b> ".

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Step	Action
30.	The quantity entered here should reflect the additional quantity that you are requesting.
31.	Click the <b>UOM</b> button. 
32.	Click an entry in the <b>Unit of Measure</b> column. 
33.	Click the <b>Category</b> button. 
34.	Enter the desired information into the <b>Category</b> field. Enter "99907".
35.	Click the <b>Look Up</b> button. 
36.	Click an entry in the <b>Category</b> column. 
37.	Enter the desired information into the <b>Price</b> field. Enter "100.00".
38.	Click the <b>Save</b> button. 
39.	Click the <b>Add Comments</b> link. 

**FIU**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | 



**Menu**

- Requisitions
  - Reconcile Requisitions
  - Review Requisition Information
  - Reports
  - Add/Update Requisitions
    - Approve Amounts
    - Approve CharFields
    - Stage For Loading
    - Load Requisitions
    - Update Direct Shipments
    - Budget Check
    - Enter Event Request
    - Purge Load Requests
    - Approval Workflow
  - Request for Quotes
  - Procurement Contracts
  - Vendor Rebates
  - Purchase Orders
  - Receipts
  - Return To Vendor
  - Procurement Cards
  - Supplier Schedules
  - Analyze Procurement
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  - eProcurement
  - Services Procurement
  - Sourcing
  - Engineering
  - Manufacturing Definitions
  - Production Control
  - Configuration Modeler
  - Product Configurations
  - Quality
  - Demand Planning
  - Inventory Policy Planning
  - Supply Planning
  - Grants
  - Program Management
  - Project Costing
  - Proposal Management
  - Maintenance Management
  - Resource Management
  - Lease Administration
  - Staffing

**Header Comments**

Business Unit: FIU01      Requisition Date: 05/13/2009  
 Requisition ID: 0000074775      Status: Open

\*Sort Method:       \*Sort Sequence:

**Comments**      Find | View All      First  |  | Last

[Copy Standard Comments](#)      Comment Status: Active     

Send to Vendor     Shown at Receipt     Shown at Voucher

**Associated Document**

Attachment                 

From -> REQ FIU01-0000074775

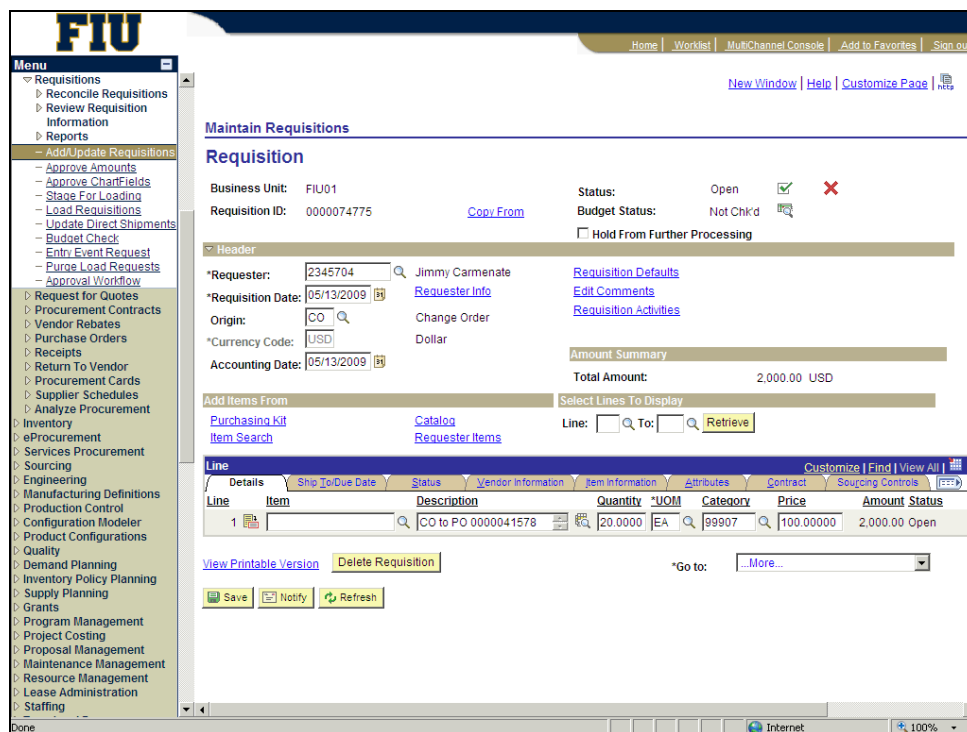
Internet      100%



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## PS FIN Purchasing: Entering Requisition Change Orders

Step	Action
40.	Enter the desired information into the <b>Spell Check Comments (Alt+5)</b> field. Enter " <b>If you have any comments for the vendor or the purchasing department, please enter them here.</b> ".
41.	Click the <b>Send to Vendor</b> option. <input type="checkbox"/> Send to Vendor
42.	Click the <b>Shown at Receipt</b> option. <input type="checkbox"/> Shown at Receipt
43.	Click the <b>Shown at Voucher</b> option. <input type="checkbox"/> Shown at Voucher
44.	Click the <b>OK</b> button. <input type="button" value="OK"/>



Step	Action
45.	Click the <b>Horizontal</b> scrollbar.
46.	Click the <b>Line Comments</b> button. <input type="button" value="Line Comments"/>

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- Project Costing
- Proposal Management
- Maintenance Management
- Resource Management
- Lease Administration
- Staffing

Line Comments

Business Unit: FIU01      Requisition Date: 05/13/2009  
 Requisition ID: 0000074775      Status: Open      Line: 1

\*Sort Method:       \*Sort Sequence:      

Comments      Find | View All      First 1 of 1      Last

           Comment Status: Active           

Send to Vendor       Shown at Receipt       Shown at Voucher

Associated Document

Attachment                         Email

From -> REQ FIU01-0000074775

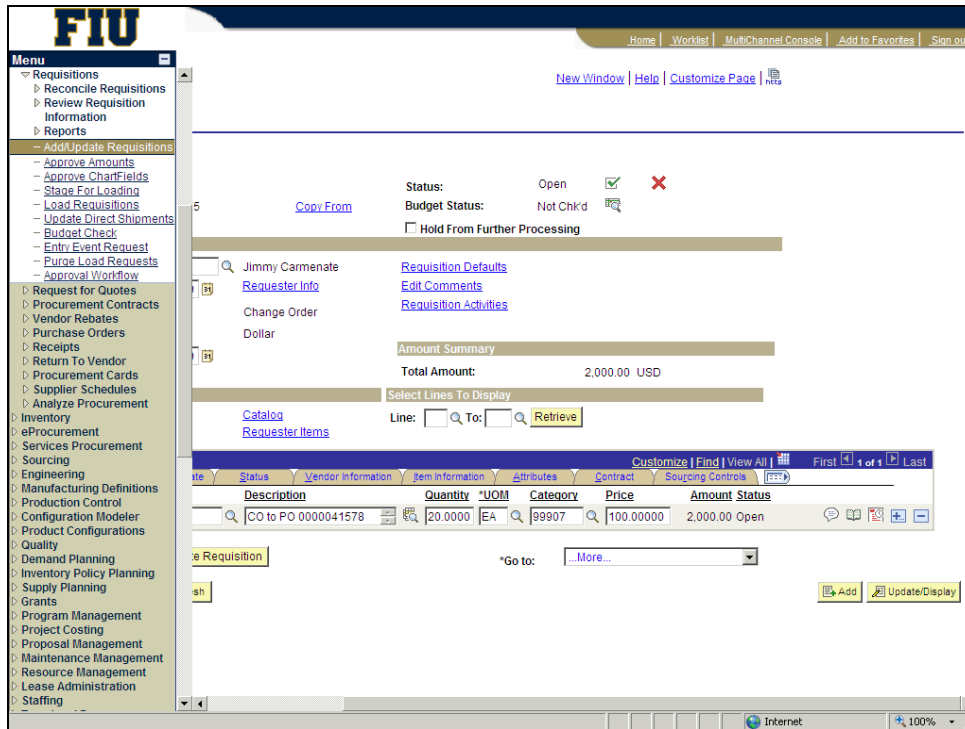
          




Step	Action
47.	Enter the desired information into the <b>Spell Check Comments (Alt+5)</b> field. Enter " <b>Please enter comments specific to the line here.</b> ".
48.	Click the <b>Send to Vendor</b> option. <input type="checkbox"/> Send to Vendor
49.	Click the <b>Shown at Receipt</b> option. <input type="checkbox"/> Shown at Receipt
50.	Click the <b>Shown at Voucher</b> option. <input type="checkbox"/> Shown at Voucher
51.	Click the <b>OK</b> button. <input type="button" value="OK"/>



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Step	Action
52.	Click the <b>Horizontal</b> scrollbar.
53.	Click the <b>Save</b> button. 
54.	Click the <b>Pending Approval</b> button. 
55.	Click the <b>Save</b> button. 
56.	Congratulations! You have successfully created a <b>Change Order</b> . <b>End of Procedure.</b>