

Adding additional funds to your current Requisition/PO line.

To initiate the change request, select 'Edit Requisition' from the dropdown under <Select Action> and click on the 'Go' Button.

	<u>Req ID</u>	Requisition Name	<u>BU</u> D) <u>ate Status</u>	<u>B</u> ı	udget <u>Origin</u>	<u>FY</u>	<u>Total D</u>	ocument Count		
4	1000064800	Conserve - 4 mo - FY17	NAUBU 08	NAUBU 08/11/2016 PO(s) Completed No				To initiate the	Q	<select action=""></select>	Go
	Requester:	Paddock,Charlotte	Entered By:	Paddock,Cha	rlotte	Priority:	Мес	change request,	umentation	<select action=""></select>	-
	Pre-Encumbra	Pre-Encumbrance Balance:		0.00 USD				edit the		Check Budget Copy Requisition	
L	-*			👫 📝		ange Receiving		requisition.		Edit Requisition	
L					Channer					View Approvals	
L	Requisition	Requisition Approvals		Inventory <u>Orders</u> Change				Returns	Invoice	rayment	J

Click 'OK' on the message indicating approval will be restarted.

Message
This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)
Click OK to continue, or click Cancel to go back.
OK

To change the price, enter the amount you want to increase your total price to in the Price field. In this example below, we changed the price from \$6,000 to \$6,500.

Edit Requisition													
🙀 <u>1. De</u>	fine Requisit	tion	E	2. Add Items a	nd Services		3. Review and Submit						
Review the det	ails of your requ	isition, make	any nece	essary changes, and su	Ibmit it for approval.								
Business Unit: NAUBU Requester: cjp			Norther	Northern Arizona University Paddock,Charlotte			Origin: PUR Q Purchasing C *Currency: USD						
Card Number:				•	Expiration Date:			Increased the price to \$6,000 to \$6,500.					
Requisition L	ines 👔												
<u>Line</u>	Description			Vendor Name	<u>Quantity</u>	<u>UOM</u>	Price	Total					
P 🔤 1 🍃	Conserve - PE	RK - Blanket	<u>-4m</u> (Continental Service Group Inc	1.0000	Each	6,500.00000	6,000.00					
P 🔲 2 🏼 🍘	Conserve - AR	R - Blanket 4n	<u>10 -</u> (Continental Service Grou nc	J.0000	Each	100.00000	100.00					
Select	All / Deselect A	<u>II</u>				Pre-Encum	Total Amount: prance Balance:	6,100.00 USD 0.000 USD					
L 📴	Add to Favori	ites	0,	Add to Template(s)	Modify	Line / Shipping	/ Accounting	Delete Delete					
Comments 🧯	3												
Send to Ve	Send to Vendor Show at Receipt Shown at Voucher Approval Justification More Comments												
🔍 CI	heck Budget				Budget Checl	king Status:No	ot Checked						
Co Sa	ave & submit	ц	Save	& preview approvals	× Cancel (Changes	Find more items						

Click on the Budget check



Edit Requ	Edit Requisition												
🙀 <u>1. Defi</u>	ne Requisiti	on	2. Add Items	and Services		3. Review and	/ and Submit						
Review the detail	ls of your requi	sition, make any	necessary changes, and s	ubmit it for approval.									
Business Unit:	Business Unit:		thern Arizona University			Origin:	PUR Q Purchas	ing Oversight					
Requester:		сјр		Paddock,Charlotte		*Currency:	USD						
Requisition Name:		Conserve - 4 mo	- FY17			Priority:	Medium -						
Card Number:			•	Expiration Date:		Use Proc	curement Card						
Requisition Lin	es 😰												
<u>Line</u>	Description		<u>Vendor Name</u>	<u>Quantity</u>	<u>UOM</u>	<u>Price</u>	Total						
Þ 🖻 1 谢 🤉	Conserve - PE	RK - Blanket - 4m	Continental Service Group Inc	1.0000	Each	6,500.00000	6,000.00						
P 🔲 2 谢 🤉	Conserve - AR	- Blanket 4mo -	Continental Service Gro	1.0000	Each	100.00000	100.00						
Select All	I / Deselect All				Pre-Encumb	Total Amount: rance Balance:	6,100.00 USD 0.000 USD						
L 📴	Add to Favorit	es 🐴	Add to Template(s)	Modify	Line / Shipping	/ Accounting	Delete						
Comments 👔													
	4	C	Density Char				More C	omments					
Che	aor ck Budget	Show a	t Kecelpt 👘 Sho	Budget Chec	□ Ap king Status: Nc	oproval Justification	More C	ominelita					
Carlos Save	e & submit	Si Si	ave & preview approvals	× Cancel	Changes								

A message will appear regarding budget checking this increase will submit your changes to be submitted for approval. Click Ok.

Message	1
Check Budget will save and submit the requisition for approval (18036,12107)	
OK	

Click on the 'Save & Submit' button.

Edit Requisition												
📑 <u>1. Define Requ</u>	isition	2. Add Items a	and Services		3. Review and Su	ıbmit						
Review the details of your	requisition, make any r	necessary changes, and s	ubmit it for approval.									
Business Unit:	NAUBU	hern Arizona University			Origin:	PUR Q Purch	asing Oversigh					
Requester:	сјр		Paddock,Charlotte		*Currency:	USD						
Requisition Name:	Conserve - 4 mo -	FY17			Priority:	Medium 👻						
Card Number:		-	Expiration Date:		Use Procu	rement Card						
Requisition Lines 👔												
<u>Line</u> <u>Description</u>	n	<u>Vendor Name</u>	Quantity	<u>UOM</u>	Price	<u>Total</u>						
🖹 📄 1 🍰 <u>Conserve</u>	- PERK - Blanket - 4m	Continental Service Group Inc	1.0000	Each	6,500.00000	6,000.00 📑						
🕨 📄 2 🏼 👔 Conserve	AR - Blanket 4mo -	Continental Service Gro Inc	up 1.0000	Each	100.00000	100.00	0					
Select All / Desele	<u>et All</u>			Pre-Encumbra	Total Amount: ance Balance:	6,100.00 USD 0.000 USD						
🖵 🚂 🛛 Add to F	avorites 🛛 🖏	Add to Template(s)	Modify	Line / Shipping /	Accounting	Delete						
Comments 👔												
Send to Vendor	Show at	Receipt 🔲 Sho	wn at Voucher	🖾 Арр	roval Justification	More	Comments					
Check Budge	1		Budget Check	ting Status:Not	Checked							
Save & submit Save & preview approvals X Cancel Changes Find more items												



The approver expands the "change request lines" to view the "change request details". Then they can approve the requisition.

Requis	sition	Approva	il								
					D	ocumentation					
Busine	ess Uni	t:	NAUBU								
Requis	sition II	D:	1000064800								
Requis	sition N	ame:	Conserve - 4 mo	- FY17							
Reque	ster:		Paddock,Charlo	tte							
Entere	d on:		08/11/2016								
Status	:		Pending		Tot		6,60	0.00 USD			
Priorit	y:		Medium								
Budge	t Statu	s:	Valid								
Ne U	o justifi Edit I	cation ent Requisitio	ered by requester.							View printable	version
Line	Inform Informa	ation 🧯	?				Pers		Find	Tirst K 1-2	of 2 DI La
	Lin	e It	em Description	Ň	/endor Name	Quantity		UOM	Price		
Z 0	>	1 <u>C</u>	onserve - PERK - Blank	<u>et</u> (CONTINENTA-004			1.0000	EA	6500.00000	USD
		2 🖸	onserve - AR - Blanket -	4 <u>mo</u> (CONTINENTA-004			1.0000	EA	100.00000	USD
<u>Se</u>	elect All	/ Deseler	ct All			-					
-	1	lew Line	Details	Approve	Ø Deny	0	Hold				
🕶 Chan	ae Rea	uest Lin	e(s)								
Chang	ie Real	iest Deta	ils			Person	alize Find	a , *	Firs		st
Line	Sc	hed	Field Name	New Field Va	Value Prior Value			Reaso	on Code		
	1 1 Requisition Price 6500.00000					6000.0000					

After the approver has approved the requisition; the requestor/buyer will receive an email prompting them to approve the change order. Change orders on DPT requisitions will be approved by the established departmental requisition approver. Change orders on PUR requisitions will be approved by the Purchasing Buyer. PUR change orders will need to have supporting backup sent to the Buyer for the file.

The following requisition has been "Approved".
Requester: cjp
Business Unit: Northern Arizona University
Requisition ID: 1000064800
Requisition Name: Conserve - 4 mo - FY17
Date: 2016-08-11
You can navigate directly to the approval page for more information by clicking the link below.
https://financials.peoplesoft.nau.edu/psp/pf9101/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESS_UNIT=NAUBU&REQ_ID=1000064800

Requestors will also receive the regular approval email. After receiving the email the requestor/buyer will navigate to the worklist and open the change request or navigate directly to eProcurement > Buyer Center > Approve Change Requests.



Favorites	Main Menu > Worklist > V	Vorklist		
	Search Menu:			
Workli		(>)		
Worklist	🔁 Employee Self-Service	•		
	Supplier Contracts	•		
Detail Viev	🗀 Items	•	Worklist Filters	~
	Vendors	+		
Worklist	🗎 Purchasing	• •		Personalize Find View
From	eProcurement		vitv	Priority L
	Services Procurement	Buyer Center		
	🧰 Grants	Create Requisition	Vendors	
	Travel and Expenses	Manage Requisitions	Receipts	· · · ·
	Accounts Pavable	Manage Requisition Appro	Dispatch Purchase Orders	
	Asset Management	Receive Items	Approve Change Requests	
	Commitment Control	•	Procurement Processes	
	General Ledger	•		
	Set Up Financials/Supply	Chain 🕨		

Enter the PO Number and click 'OK'

Selection Criteria	
Business Unit: PO Number: "Vendor: Vendor ID: Vendor Name: Buyer: Purchase Order Reference: Review Complete: PO Updated: Change Order Source:	NAUBU Q 2000061650 × Q C C C C C C C C C C C C C
OK Cancel Refresh)

After opening the "approve change request" page, change the approval status to "Approved" and save the page.

Арр	Approve Change Requests													
Approve Change Requests Personalize Find View All # First D 1.2 of 2 D Las Change Reader Change Reader														
Sel	Business Unit	PO ID	*Approval Status	Change Order	Change Order Source	Date/Time	Reviewed	Reviewed On	Modified By					
	NAUBU	2000061650	Approved 1 Denied	1	ePro	11/09/2016 2:36:26PM			cjp					
	NAUBU	2000061650	Not Approved Approved	1	ePro	10/11/2016 4:01:16PM			geb9					
Search Show D Purchas	Sarch Show Detail Entry Purchase Order Inquiry Save 2 Notify 2 Refresh 2 Notify 2 Refresh													

After approving the PO change request, the change order process (for DPT) will run during these specific times: 7:30am, 9:30, 11:30, 1:30pm and 3:30. For PUR change orders, the purchasing buyer assigned to your PO, will process your change request after review of your supporting documentation.

After processing the change order, the PO is updated. The PO will need to be dispatched again.



Favorites Main Menu > Purchasing > Purchase Orders > Add/Update POs																	
Maintair	D	rahaar	Order														
Maintair	IPI	urchase					Docume	entation									
Purch	as	e Oro	ler														
Busines	s U	nit:	NAUBU				PO Statu Durdent	IS:		Approved	2	7 X					
Change	Ord	ler:	2000061650				Duuget Status.			Valid		10 JF					
Copy Fr	om:			¥	Hold From Further P					r Processing							
👻 Heade	r																
*PO Date: 08/11/2016		08/11/2016	Vendor Search		1	Doc Tol S	Status:		Valid								
*Vendor:	*Vendor: CONTINENTA-004		CONTINENTA-004	Vendor Details		Backorde	er Status:		Backo	ordered	Create Ba	ackOrder					
*Vendor ID: 0000001247		0000001247	Continental Service Group I	rice Group Inc			Status:	Partial									
*Buyer:	*Buyer: cjp		cjp	Paddock,Charlotte	Paddock,Charlotte			*Dispatch Method: Print				¥	Dispatch				
PO Refe	PO Reference:						Amount	Summary									
Header D)eta	ils	Activity Summary	1			Merchand	lise:			6,600	6,600.00					
PO Defa	<u>ults</u>		Document Status				Total Amount:			6.600.00 USD							
PO Activ	<u>ons</u> ities		Add ShipTo Com	ents			Encumbrance			5.479.55 USD							
						I	Balance:										
Add Item	ıs F	rom					Select Lir	ies To Dis	play								
Purchas	ing	<u>Kit</u>	Catalog	Item Search		L	ine:	Q T	o:	Q Ret	rieve						
Lines											Personal	ize Find	View All 🗖	11 p	irst 🚺 1-2 o	12 🕨	Last
Details		Ship <u>T</u> o/D	ue Date <u>S</u> tatuses	Item Information Attributes	FQ	<u>C</u> ontract	Receiving										
Line		Item		Description		PO Qty	*UOM	Category		Price	Me	rchandise Amount	Status				
				Conserve - PERK - Blanket -					_ [_						
1	r the second sec			4mo - June/July/Aug/Sept - FY17	EQ.	1.0000	ËA	94633	٩	6,500.00000		6,500.00	Approved	9	129	+	
2	ŀ			Conserve - AR - Blanket 4mo - June/July/Aug/Sept- FY17	R,	1.0000	EA	94633	Q	100.00000		100.00	Approved	0	1	+	-

The PO has been updated with the new amount as shown above.

You can also view the status of your Change Request by clicking on the 'Change Request' symbol.

<u> </u>	64800 Conserve - 4 mo - FY17	NAUBU 08/11/2	016 PO(s) Comple	ted V	'alid PU	R 20	17 6,500.00	<u>0</u>	<select action=""></select>	• G
Reques	eter: Paddock,Charlotte	Entered By:	Paddock,Charlotte	;	Priority:	M	ledium	Documentation		
Pre-End	cumbrance Balance:	0.00 USD			-					
	*		<i>•</i> *		6		J.			
Re	equisition Approvals	Inventory	Orders	Change Request	Rec	eiving	Returns	Invoice	Payment	
Request	Lifespan:		-							
Line Int	formation						Personaliz	e Eind 🗖 📗 🛛	First 🚺 1-2 of 2 🚺 Last	
Line	Description	Status	Price	Quar	ntity	UOM	Vendor			
1	Conserve - PERK - Blanket	Completed	6,500.00 US	D	1.0000	EA	Continental Ser	vice Group Inc		
2	Conserve - AR - Blanket 4mo	PO Completed	100.00000 US	C	1.0000	EA	Continental Ser	vice Group Inc	×	

It will show the details of each line that has a change request. When the Change request Status shows 'Completed,' then the change has been fully processed.

	<u>Requisi</u>	ition ID F	equisition Name	Purchase Order	Change Date/Ti	<u>me</u>	Requisition Approval Status		Change Request Status		rocessing Error
$\overline{\nabla}$	100006	4800 (Conserve - 4 mo - FY17	2000061650	10/27/2016 6:1	15:26PM	Approved		Completed		
	Requester: Paddock,Charlotte		Entere	ed By:	Paddock,Charlotte						
Ch	Change Request Details Personalize Find View All 🏝 🛗 First 🚺 1 of 1 🗅 Last										
Ch	Change Requests Change Reason Processing Errors										
Line	•	Sched Change Date/Time Item Description			Change Type Field		Prior Value	Changed Value	Requisition Approval Status	Change Request Status	
	1		1 10/11/2016 3:50:23PM	Conserve - PERK	- Blanket - 4m	Change	Requisition Price	6,000.00	6,500.00	Approved	Completed

Initiating a Change Request



If you cannot dispatch your change request even though the status shows 'Completed,' then please navigate to the PO to make sure the budget is Valid.

Navigation is Purchasing > Purchase Orders > Review PO Information > Purchase Orders

Enter the PO number and click on the search button:

Favorites Main Menu	> Purchasing	> Purchase Order	s > Review PO Ir	nformation > Purchase Orders						
Purchase Order Inquiry										
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:	= •	NAUBU	Q							
PO ID:	begins with 🔻	2000092483								
Contract SetID:	begins with v		Q							
Contract ID:	begins with V		Q							
Release Number:	= •									
Purchase Order Date:	= •		31							
PO Status:	= v		•							
Short Vendor Name:	begins with v		Q							
Vendor ID:	begins with v		Q							
Vendor Name:	begins with v		Q							
Buyer:	begins with v		Q							
Buyer Name:	begins with 🔻		Q							
Case Sensitive										
Search Basic Search Criteria										

If the Budget Status shows 'Not Chk'd' as shown below, you will need to email Purchasing at <u>nau-purchasing@nau.edu</u> to budget checked this PO for you. After this PO budget status is 'Valid,' you can finally dispatch your PO.

Favorites Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders											
Purchase Order Inquiry											
Purchase Order				Documentation (0) Related Requisition Documentation (1)							
Pueinose Unit: NAUDU					PO Status: Onen						
PO ID: 200009248					Budget Status: Not Chk'd						
Change Order: 1											
➡ Header											
BO Date: 03/18/2010	PO Date: 00//0/00/0						Doc Tol Status: Valid				
Vender Name: MDUUDIE 0	03/16/2019					Packerder Status: Net Packerdered					
Vendor ID: 0000021090	MDLURIE-001 0000021000 Vander Detaile					Receint Status: Partial					
Buwert Ochindela /	Vender Beitans				Hold From Further Processing						
Buyer: Schindele,Kristina R				Amount Summary							
PO Reference.					Merchandise:		350.0	00			
Header Details All RTV	Document Status				Freight/Tax/Misc.:			<u>0.00</u>			
Header Comments Matching			Total:		350.0	350.00 USD					
Change Order Activity Su	mmary	Encumbrance 150.00 USD				D					
					Balance:						
Lines Personalize Find Vew All 1 🕮 🗮 Find K 1 of 1 🗋 Last											
Line Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount		Status				
1	RS SPEAKER LURIE	96104	1.0000	EA	350.00	USD	Approved	\bigcirc	1		
Related Links											