Purchase Orders Miscellaneous– Section 6.0a

This process will be used to create Change Orders, Cancel, or Close a PO. By default, will also learn PO search.

Audience: All

Additional Resources:
- Video (where applicable – insert link)
- Help Text (where applicable – insert link)
- GMHEC Website (where applicable – insert link)
- cheryl.foster@gmhec.org

Process Step & Description

This step is for change orders on POs that have not been approved.

Navigation Path:
➢ Procurement → Purchase Orders

Go to the Purchase Orders page, click the Task icon, and choose “Manage Orders.”

Search for the PO you would like to modify.

Quick Tip! Enable your pop-ups in Oracle.
Choose your PO:

GM-PO-1169

Go to “Actions” and select “Withdraw”

The following pop-up will appear. Enter a reason to “withdraw” your PO. Click “Ok”.

A confirmation pop-up will appear. Click “Ok”
Go to “Actions” and select “Edit”

Choose “Yes” to edit your PO

Warning

This action will create a change order on the document. Do you want to continue? (PO-2055113)

Yes No

The PO is now open for changes. Edit your document accordingly. Common change order purposes:

- Adjust line items
- Delete line items
- Add line items
- Correct distributions
- Split distributions

To add a line, first add your description on what you are changing:
Scroll down and click “+” to add a line:

To delete a line highlight the line you need to remove and click the delete button:

Correcting your charge of accounts or splitting your distributions, are the same as they are when you first edited your requisition.

As when you submit a requisition or PO, you have the following options:

- [Check Funds]
- [Manage Approvals]
- [Actions ▼]
- [Save ▼]
- [Submit]
- [Cancel]

Click “Submit” when you are ready to submit your change.

This step is for change orders on POs that have been approved.

Navigation Path:
➢ Procurement → Purchase Orders

Quick Tip! Use these instructions when adding shipping and/or taxes in a PunchOut purchase order.
Go to the Purchase Orders page, click the Task icon, and choose “Manage Orders.”

Search for the PO you would like to modify.

** Keywords
Procurement BU
Supplier
Buyer: Foster, Cheryl

** Order: GM.PO-1028
** Requisition
** Status

Include Closed Documents No

Choose your PO:
GM-PO-1028

Go to actions and choose “Edit”

To change your distributions, you will need to create splits. In the following example, the object coded needed to be changed. Should you have any changes to your distributions, you will need to follow this example.

IMPORTANT NOTE:
Adjusting line items and changing charge accounts now require additional steps (see following screenshots and directions). Changes like delivery, adding or deleting a line item remain the same.
Go to Distributions tab and create splits:

<table>
<thead>
<tr>
<th>Lines</th>
<th>Schedules</th>
<th>Distributions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actions ▼</td>
<td>View ▼</td>
<td>Format ▼</td>
</tr>
</tbody>
</table>

Each line item will require you to zero-out the original, and then create a new distribution using the split feature:

As you can see from the above, the quantity has been zeroed out, making the original line now empty. Now, add in an additional line via the split feature for each line item, using the correct distribution.

You would also need to follow this same path should there be any changes in price.

Click “Submit” when you are ready to submit your change:

Check Funds  Manage Approvals  Actions ▼  Save ▼  Submit  Cancel

Navigation Path:
➢ Procurement → Purchase Orders → Manage Orders

Go to the Purchase Orders page, click the Task icon, and choose “Manage Orders.”

Search for the PO you would like to cancel.
Choose your PO:

GM-PO-1169

Go to “Actions” and choose “Cancel Document:

The following pop-up will appear:

1. Enter reason
2. Enter communication method to notify supplier
3. If notified by email, choose email for supplier (may already pre-populate)
4. Request acknowledgement if needed
5. Cancel any unfulfilled items
6. Click “OK”

A pop-up will appear confirming your cancellation, and notifying you that an approval request has been sent:
The change order for document Purchase Order number GM-PO-1169 was submitted for approval.