## CHANGE ORDER REQUEST FOR GOODS REQUISITIONS

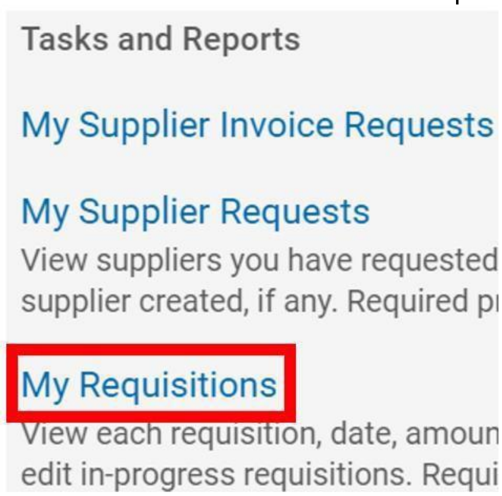
**Please read the help text.** These should only be submitted if a previous requisition has already become a PO and you wish to make a change or add additional funds.

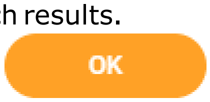
## MY REQUISITIONS

From the Home page:

1. Type **my req** in the search bar and hit **Enter.** Or utilize the My Requisitions worklet.


2. Click on the **My Requisitions** link under the Tasks and Reports list.




3. Use the **Calendar** icon or type to change the **Document Date On or After** field if the requisition was created more than a month ago.
4. Use the **Prompt** icon or type to change any other applicable field to narrow the search results.
5. Click  .
   6. The report will display all requisitions that the initiator has created fitting the search parameters.
7. Note the purchase order number under the Purchase Order column.

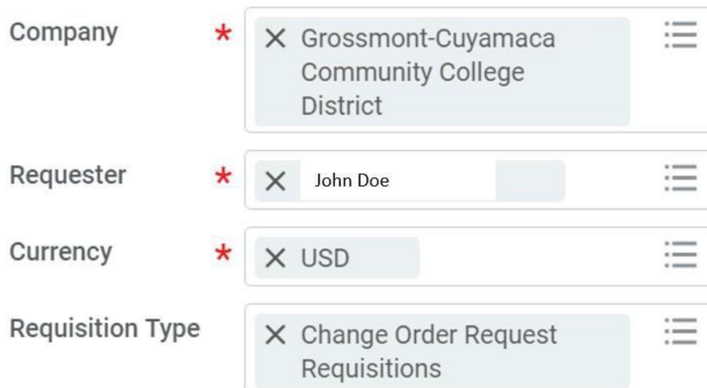
| Requisition | Requisition Type | Requesting Inventory Site | Document Date | Total Amount | Currency | Suppliers | Purchase Orders | Request Status |
|---|---|---|---|---|---|---|---|---|
| PR16.000012 | Blanket Purchase Order Requisitions | | 09/22/2016 | 1,000.00 | USD | RON BAKER CHEVROLET | P16.000006 | Successfully Completed |

## CREATE A REQUISITION

From the Home page:


1. Type **cre req** in the search bar and hit **Enter**.
2. Click the **Create Requisition** link from the Tasks and Reports list.


3. The **Company** and your **name** will default into the fields. Note that the Company field will default in from your last Requisition transaction.
4. Use the **Prompt** icon or type to indicate the **Requisition Type** of **Change Order Request Requisitions.**



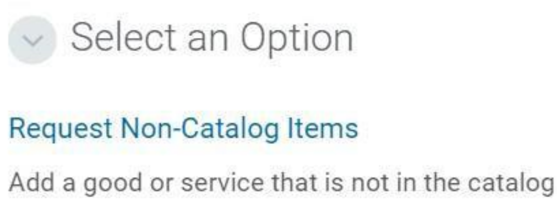

5. Click 

.

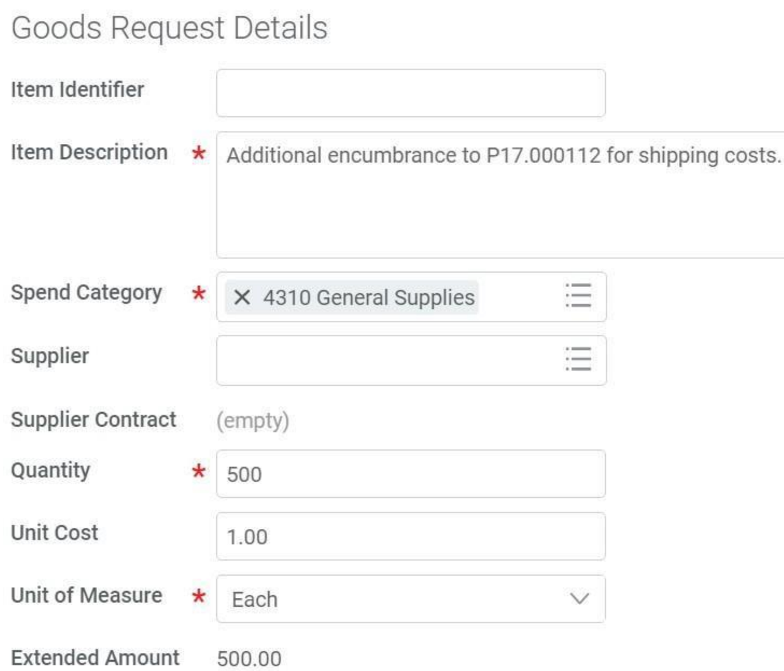
## REQUEST NON-CATALOG ITEMS

From the **Create Requisition** screen:

1. Click the **Request Non-Catalog Items** link.



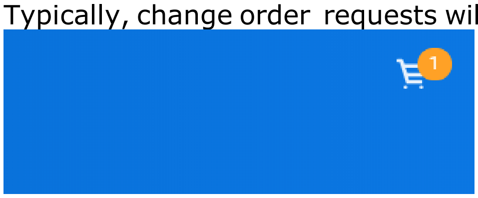

2. Leave the **Item Identifier** field blank.
3. In the **Item Description** field, type to indicate which existing Purchase Order number you wish to add additional funds and a reason.
4. Use the **Prompt** icon or type to indicate the **Spend Category**. This will need to correspond with the spend category on Purchase Order.
5. Leave the **Supplier** field blank. You'll have an option to input the supplier later and will only need to do it once to apply to all lines.
6. Use the **Calendar** icon or type to indicate the **Start Date** of the service.
7. Use the **Calendar** icon or type to indicate the **End Date** of the service.
8. Type to fill the **Extended Amount** for the additional funds.




9. Click 

to add the line to the Requisition.
10. Click 

. Notice how that item was added to the cart in the top right of the screen.
11. Repeat steps 4 – 11 until all lines have been added to your Requisition, if needed. Typically, change order requests will only have one line item.




Requisition Type
Change Order Request Requisitions

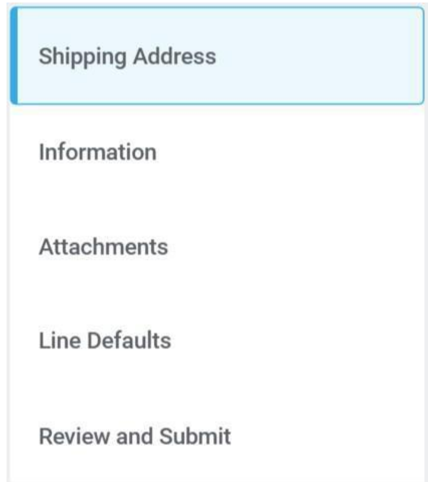
12. Once you are ready to continue, click on the **Cart** icon 

.
13. The Cart screen displays. Click 


## CHECKOUT REQUISITION

From the **Checkout** screen:

1. Double-check that the **Ship-To Address** matches the requester's campus location.




2. Click 

or click on the **Information** section.

3. Leave the **Memo to Supplier** field blank. Purchasing will determine what special notes need to be added here.

4. Type to input any special notes for Purchasing in the **Internal Memo** field. These notes will not print on the PO.

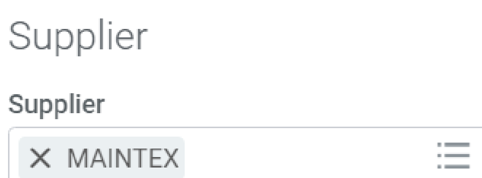
5. Click 

or click on the **Attachments** section. Drag and drop documents that need to be attached to the requisition. Blanket POs will require the Signatures Attachment.

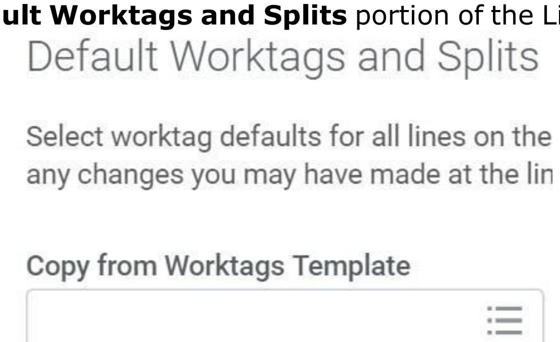
6. Click 

or click on the **Line Defaults** section.

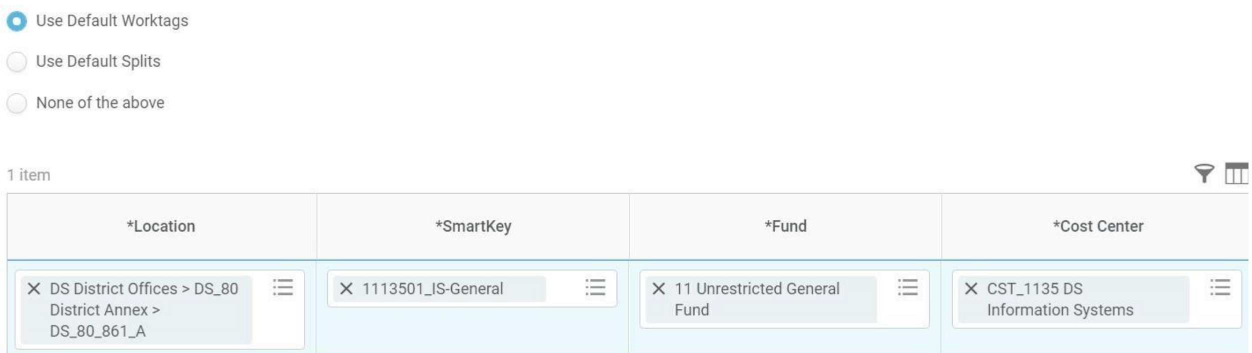
7. Use the **Prompt** icon or type to select the **Supplier** field. This will apply to all Requisition lines.




8. Scroll down to the **Default Worktags and Splits** portion of the Line Defaults section.




   a. If you have saved a Worktags Template prior: select the applicable worktag combination by using the **Prompt** icon or typing. If you do not have a saved template, then see Activity 6.1.
   b. If you are using a worktag combination that has not been saved as a template: check the **Use Default Worktags** radio button. Default worktags will display. Use the **Prompt** icon or type to input the correct **SmartKey** worktag.




**NOTE:** The **Location** field is to assist the Warehouse to deliver the goods. This should be the **office number where the items will be delivered,** NOT the building and NOT the college/district. Check the staff directory for your exact room number.

9. Use the **Prompt** icon or type to input the **Location**. It is recommended to type to room **number** (e.g. 142) and click **Enter** to see your options.
10. Click 

 or click on the **Review and Submit** section.
11. The **Request Date** defaults to today.
12. Review the Requisition.
13. Scroll on the line items and remove the **Ship-To Contact** and **Deliver-To** values by clicking on the **X**.


14. Once you have resolved all error messages and made any further edits on the line level, click 

 to run the budget check and move this along for approval.