## 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.

Q my req

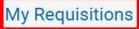
2. Click on the My Requisitions link under the Tasks and Reports list.

Tasks and Reports

# My Supplier Invoice Requests

## My Supplier Requests

View suppliers you have requested supplier created, if any. Required p



View each requisition, date, amoun edit in-progress requisitions. Requi

- 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  $\equiv$  or type to change any other applicable field to narrow the search results.



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:

5. Click

- C cre req
- 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  $\equiv$  or type to indicate the **Requisition Type** of **Change Order Request Requisitions.**

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er \star X John Doe	
× USD	≔
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	Community Colle District xer * X John Doe y * X USD tion Type X Change Order Re

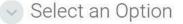
J. CICK

7.

### REQUEST NON-CATALOG ITEMS

#### From the Create Requisition screen:

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



### **Request Non-Catalog Items**

Add a good or service that is not in the catalog

- 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 <sup>i</sup>≡ 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 indicate the **Start Date** of the service.
  - 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.

Goods Request Details	Goods	Request	Details
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Item Identifier	
Item Description	Additional encumbrance to P17.000112 for shipping costs.
Spend Category	★ 4310 General Supplies :=
Supplier	
Supplier Contract	(empty)
Quantity	<b>*</b> 500
Unit Cost	1.00
Unit of Measure	★ Each ∨
Extended Amount	500.00
οκ 10. Click . Notice the screen. 11. Repeat steps 4 – 11 until all	add the line to the Requisition. e how that item was added to the cart in the top right of lines have been added to your Requisition, if needed. uests will only have one line item.
Requisition Type Change Order Request Requisitio	ons
12. Once you are ready to contin	ue, click on the <b>Cart</b> icon
. ,	Checkout
13. The Cart screen displays. Clic	
CHECKOUT REQUISITION	

# From the **Checkout** screen:

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

Shipping Address
Information
Attachments
Line Defaults
Review and Submit

2. Click

6.

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.

NET	
I TEAL	

Next

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.

Click

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

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

Supplier

Supplier

× MAINTEX ∷

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

Select worktag defaults for all lines on the any changes you may have made at the lin

Copy from Worktags Template

- a. If you have saved a Worktags Template prior: select the applicable worktag combination by using the **Prompt** icon is 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.

Use Default Worktags							
Use Default Splits							
None of the above							
1 item							<b>?</b>
*Location		*SmartKey		*Fund		*Cost Center	
X DS District Offices > DS_80 District Annex > DS_80_861_A		X 1113501_IS-General		X 11 Unrestricted General Fund	≡	× CST_1135 DS Information Systems	

**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 <u>staff</u> directory for your exact room number.

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

Next

- or click on the **Review and Submit** section.
- 11. The **Request Date** defaults to today.
- 12. Review the Requisition.

10. Click

13. Scroll on the line items and remove the **Ship-To Contact** and **Deliver-To** values by clicking on the **X**.

*Ship-To Address			Ship-To Contact			Deliver-To	
× 8800 Grossmont College Drive El Cajon, CA 92020 United States of America	Ξ	×	hill [C]	Ξ	×	Offices	Ξ

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



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