

## 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.

- Tasks and Reports
- Create Requisition Worktags Template
- Create Supplier Invoice Request
- Create Requisition Template
- Create Requisition**

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

Company	*	X Grossmont-Cuyamaca Community College District	
Requester	*	X John Doe	
Currency	*	X USD	
Requisition Type		X Change Order Request Requisitions	

OK

- Click .

## REQUEST NON-CATALOG ITEMS




From the **Create Requisition** screen:

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

 Select an Option

### Request Non-Catalog Items

Add a good or service that is not in the catalog

- Leave the **Item Identifier** field blank.
- In the **Item Description** field, type to indicate which existing Purchase Order number you wish to add additional funds and a reason.
- Use the **Prompt** icon  or type to indicate the **Spend Category**. This will need to correspond with the spend category on Purchase Order.
- 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.
- Use the **Calendar** icon  or type to indicate the **Start Date** of the service.
- Use the **Calendar** icon  or type to indicate the **End Date** of the service.
- Type to fill the **Extended Amount** for the additional funds.

## Goods Request Details

Item Identifier	<input type="text"/>
Item Description *	Additional encumbrance to P17.000112 for shipping costs.
Spend Category *	X 4310 General Supplies
Supplier	<input type="text"/>
Supplier Contract	(empty)
Quantity *	500
Unit Cost	1.00
Unit of Measure *	Each
Extended Amount	500.00


9. Click **Add to Cart** to add the line to the Requisition.

10. Click **OK**. 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**

## 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


Next

2. Click **Next** 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.

Next

5. Click **Next** 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.

Next

6. Click **Next** 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.

Supplier

Supplier

X 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  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

*Location	*SmartKey	*Fund	*Cost Center
<input checked="" type="checkbox"/> DS District Offices > DS_80 District Annex > DS_80_861_A	<input checked="" type="checkbox"/> 1113501_IS-General	<input checked="" type="checkbox"/> 11 Unrestricted General Fund	<input checked="" type="checkbox"/> 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 [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.

**Next**

10. Click **Next** 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**.

*Ship-To Address	Ship-To Contact	Deliver-To
<input checked="" type="checkbox"/> 8800 Grossmont College Drive El Cajon, CA 92020 United States of America	<input checked="" type="checkbox"/> Hill [C]	<input checked="" type="checkbox"/> Offices

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

**Submit**

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