



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Changing Orders on a Requisition Sourced to a Purchase Order

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-central agencies.

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Changing Orders on a Requisition Sourced to a Purchase Order

Overview

IMPORTANT: Ensure the purchase order (PO) is in **Dispatched** status before beginning.

You can make an increase to amount and/or quantity on a requisition line, when the line is already sourced to a purchase order, but not yet paid. After changes are made on the requisition:

- The requisition goes through re-approval.
- The requisition is budget checked.
- A *Change Request* is established.
- The buyer then *approves* the change request and processes it into the PO as a *Purchase Order Change Notice* (POCN).

Note: In the example below, the requisition line is for a quantity of 30 and a unit price of \$1.61.

A PO exists, but there is no receipt or voucher.

Requisition Summary

Requisition Name: FIN_Supply restock 2.21.2023
 Business Unit: 000
 Requisition ID: 0000001085
 Requisition Date: 02/21/2023
 Request State: PO(s) Dispatched

Requester: [Redacted]
 Entered By: [Redacted]
 Budget Check Status: Valid
 Total Amount: 48.30 USD

Requisition Lifeline

Requisition → Approves → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Lines

Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
Line 1 - Expanding File Folder 3.5 inch, open top, Freight included		SHIPPING	PO Dispatched	30	EACH	1.61	48.30 USD

The PO line amount is the same quantity and amount.

Purchase Order

Business Unit: [Redacted] PO ID: 25-0185
 PO Status: Dispatched
 Budget Status: Valid
 LBB Status: N/A

Amount Summary

Merchandise	48.30
Freight/Tax/Misc.	0.00
Total Amount	48.30 USD
Encumbrance Balance	48.30 USD

Lines

Line	Item	Description	PO Qty	UOM	Price	Merchandise Amount	Status
1		Expanding File Folder 3.5 inch, open top, Freight included	30.00000	EA	1.61000	48.30	Approved

Increase Requisition Line Amount and/or Quantity

Navigation

NavBar: Financials; eProcurement; Manage Requisitions

Note: In the example below, both the requisition line and the quantity are increased.

To increase the line amount and/or the quantity:

1. Select **Edit** from the drop-down menu on Manage Requisitions Page.

The screenshot shows the 'Manage Requisitions' interface. At the top, there is a 'Requisition Search' section with a 'Keyword Search' input. Below this is a 'Search Requisitions' section with various filters: Business Unit, Requisition ID, Date From, Requester, Requisition Name, Request State, Date To, Entered By, Budget Status, Origin, and PO ID. A 'Search' button is present. A dropdown menu is open over the search filters, listing actions: Approvals, Cancel, Check Budget, Copy, **Edit** (highlighted), PreCheck Budget, View Cycle, View Print, [Select Action], and [Select Action].

2. Update the PRICE.
3. Update the QUANTITY.

The screenshot shows the 'Special Requests' page. The 'Item Description' is 'Expanding File Folder 3.5 inch, open top, Freight Included'. The 'Price' field is set to 1.61 and the 'Quantity' field is set to 30. Both fields are highlighted with red boxes. Other fields include 'Currency Code' (USD), 'Unit of Measure' (EA), 'NIGP Class' (615), 'NIGP Item' (41), 'Supplier ID' (1741978551), and 'Location' (200). The 'Supplier Name' is 'WORKQUEST'. At the bottom, there are 'Return' and 'Apply' buttons.

4. Select **Apply** to commit the changes.
5. Select **Submit** for to submit for reapproval.
6. Select **Budget Check**.

A *Change Request* icon is now present in the *Requisition Lifeline* section.

The screenshot shows the 'Details' section of a requisition. The 'Requisition Summary' includes: Requisition Name (FIN_Supply restock 2.21.2023), Business Unit (00), Requisition ID (0000001085), Requisition Date (02/21/2023), Request State (PO(s) Dispatched), Requester, Entered By, Budget Check Status (Valid), Total Amount (59.15 USD), and Pre-Encumbrance Balance (10.85 USD). Below this is the 'Requisition Lifeline' section, which is a horizontal timeline with icons for Requisition, Approvals, Inventory, Purchase Orders, **Change Request** (highlighted with a red box and a red arrow), Receiving, and Return.

Processing the Purchase Order Change Notice

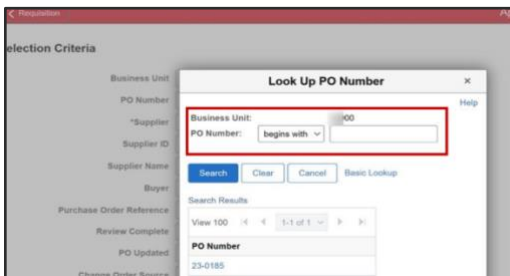
Once changes to the requisition and the PO lines are complete, the buyer can approve the change request and processes the *Purchase Order Change Notice* (POCN).

Navigation

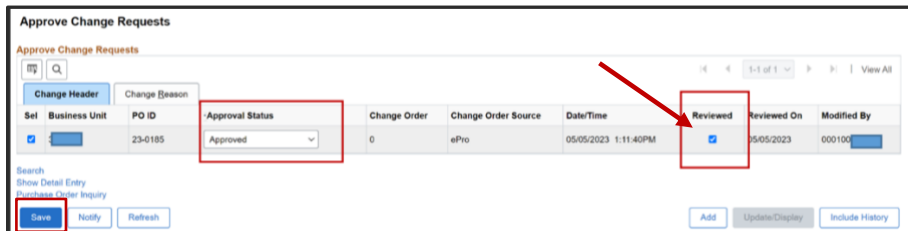
Dashboard: Purchasing; **Tile:** Buyer WorkCenter

To approve the change request and process the PONC:

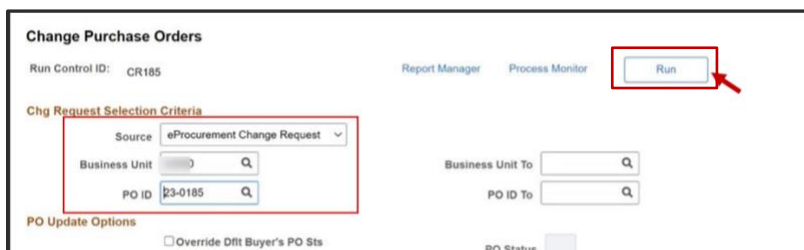
1. Select the **Reports/Processes** tab.
2. Select **Approve Change Requests**.
3. Enter the BUSINESS UNIT number.
4. Enter the PO NUMBER.



5. Select **OK**.
6. Review the line information.
7. Change APPROVAL STATUS to *Approved*.
8. Select the **Reviewed** checkbox.

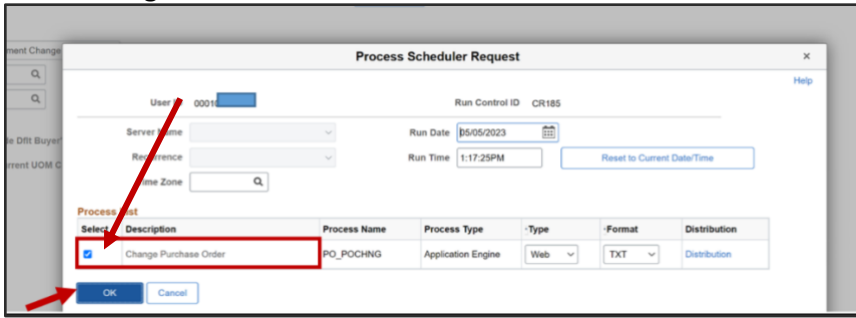


9. Select **Save**.
10. Navigate back to the *Process Change Orders* page of the Buyers WorkCenter.
11. Select **eProcurement Change Request** in the SOURCE drop-down menu.
12. Enter the BUSINESS UNIT.
13. Enter the PO ID.



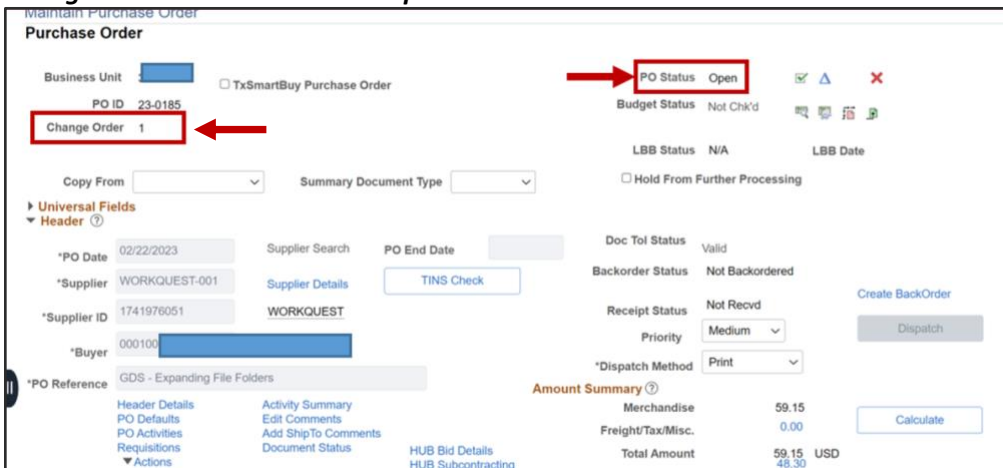
14. Select **Run**.

15. Select **Change Purchase Order Process**.



16. Select **OK**.

After the process runs (it may take a minute or two to process), the PO is updated with a **Change Order** number and is in **Open** status.



This purchase order is ready to re-approve, budget check and dispatch.

Revision History

Date	Description of Change	Changed By
Jan. 10, 2025	Initial release.	J. Goodman