

## How to Create a Change Order

**Description:** The Change Order Form consists of a main window and eleven additional windows. Use this form if you need to change quantity or unit price data on a completed and approved purchase order. Do not use a change order to add or remove items or to alter accounting information. Other non-commodity information can be changed but only in conjunction with quantity or unit price changes, not by themselves. Note that you cannot change the vendor or currency.

**Form Name/Direct Access:** FPACHAR

**Menu:** Change Order Processing Menu \*FINCO

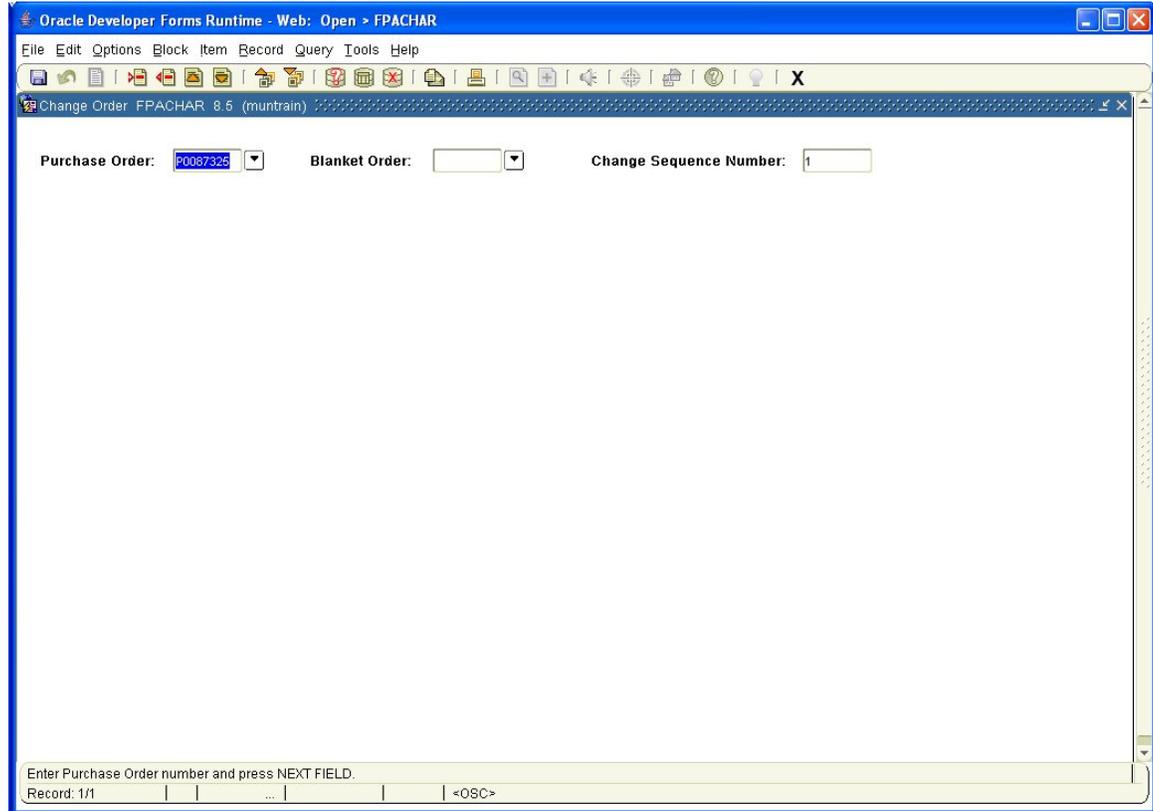
**Navigation:** Products Menu  
Finance System Menu  
Purchasing and Procurement System Menu  
Purchase Order Processing Menu  
Change Order Processing  
Menu  
Change Order Form

### General Note:

The flashlight icon provides a list of valid entries for applicable fields and fields with blue text can be double-clicked to get a list of valid entries.

### Instructions:

1. Select *Change Order Form*.



**Purchase Order:** Code representing the purchase order (PO) for which you wish to issue a change. If you know the PO number, enter it here or use the search icon (flashlight), F9 from the keyboard or *List* from the *Help* menu to initiate a query. Execute a query to see the possible POs (click the *Execute Query* button on the toolbar, F8 from the keyboard or select *Execute* from the *Query* menu). Double click to select the desired PO.

**Blanket Order:** Code representing the blanket order (BO) for which you wish to issue a change. If you know the BO number, enter it here or do a search as described above for a PO.

**Change Seq #:** Number representing the change sequence. Enter *NXT* and the system will generate the sequence number for you.

2. *Next Block* (use ctrl page down, the toolbar button or on the main menu, select *Block* then *Next*).

The screenshot shows the 'Change Order: Document Information' window. The fields are organized as follows:

- Purchase Order:** P0087325
- Blanket Order:** (empty)
- Change Seq:** 1
- Order Date:** 20-OCT-2011
- Transaction Date:** 20-OCT-2011
- Delivery Date:** 31-OCT-2011
- Comments:** (empty)
- Commodity Total:** 17,096.79
- Accounting Total:** 17,096.79
- Change Accounting Only
- Original Document Text:** None
- Purchase Order Type:** Regular
- Buyer Code:** FS01 | Financial Services - Accounting
- Blanket Order Termination Date:** (empty)
- NSF Checking
- Rush Order
- Deferred Editing
- Origin:** BANNER
- Reference Number:** (empty)

At the bottom, there is a status bar with the text: 'Enter purchase order date(DD-MON-YYYY). Record: 1/1 ... <OSC>'.

This is the *Change Order: Document Information* window. Here you can alter the initial purchasing information from the purchase order.

**Purchase Order:** Code representing the PO. It will populate based on what was entered on the first screen (if applicable).

**Blanket Order:** Code representing the blanket order. It will populate based on what was entered on the first screen (if applicable)

**Change Seq:** Number representing the change sequence.

**Order Date:** Date the PO/BO was entered. Defaults to the original PO/BO information but can be overwritten with a different date.

**Trans Date:** Date the transaction was entered and recorded to the ledgers. Defaults to the original PO/BO information but can be overwritten with a different date.

**In Suspense:** This check box indicates if the change order (CO) is in suspense. If checked, the CO is in suspense. If blank the CO is not in suspense.

Delivery Date:	Date the goods/service are required. Defaults to the original PO information but can be overwritten with a different date. Will be blank for a BO.
Comments:	Space for comments. Defaults to the original PO/BO information but can be overwritten. Do not change or delete the tender number if referenced in this field.
Document Text:	This box will have a check mark if document text exists. Select <i>Document Text</i> from the <i>Options</i> menu at the top of the screen to add document text. You should not alter the original text. <i>Save</i> and <i>Exit</i> when complete.
Commodity Total:	The total cost of the commodities on the PO/BO. Defaults to the original PO/BO information and cannot be overwritten.
Acctg Total:	The total amount of all accounting distributions (FOAPALs) on the PO. Defaults to the original PO information and cannot be overwritten. This will be blank for a BO.
Change Accounting Only:	Not used. Leave blank.
Purchase Order Type:	Identifies the type of PO. <i>Regular</i> is a regular purchase order. <i>Standing</i> is a standing purchase order.
Original Document Text:	Pull down list indicates whether the user wants to copy the original text attached to the PO/BO (if text exists). If there was no text on the PO/BO, the box will show <i>None</i> . If there was text, the user will have the option of copying the text from the PO/BO to the CO.
Buyer Code:	Code and name of the buyer. Defaults from the original PO but can be changed.
BO Termination Date:	Date the BO terminates. Will be blank for a PO. See job aid for form FPABLAR.
Rush Order:	Not used. Will be blank.
NSF Checking:	Checkbox that indicates whether the Non-Sufficient Funds checking feature is activated in the system.

Deferred Editing: Not used. Leave blank.

### 3. *Next Block*

Oracle Developer Forms Runtime - Web: Open > FPACHAR

File Edit Options Block Item Record Query Tools Help

Change Order: Requestor/Delivery FPACHAR 8.6 (muntrain)

Purchase Order: P0087325      Blanket Order:      Change Seq: 1  
Order Date: 20-OCT-2011      Transaction Date: 20-OCT-2011       In Suspense  
Delivery Date: 31-OCT-2011      Comments:       Document Text  
Commodity Total: 17,096.79      Accounting Total: 17,096.79

Requestor: Tina Wall      COA: M Memorial University of Newfoundland  
Organization: 63009 VERIP Expense      Email: tinawall@mun.ca

Area Code	Phone Number	Extension
709	8646778	6778
709	8643677	3677

Ship To: A1001

Street Line 1: Room: A1001      Contact:        
Street Line 2: Comptroller's Office      Attention To: Tina Wall  
Street Line 3: Memorial University of NF

Building: Arts & Administ      Floor:        
City: St. John's  
State or Province: NL      ZIP or Postal Code: A1C 5S7  
Nation: Canada

Area Code	Phone Number	Extension

Record: 1/1      ...      <OSC>

This is the *Change Order: Requestor/Delivery* window. Here you can alter the initial requestor or delivery information from the purchase order.

**Requestor:** Name of the person who entered the PO/BO. Defaults to the original PO/BO information but can be overwritten.

**COA:** Code representing Memorial University's chart of accounts. Default is always "M".

**Organization:** The *Organization* from the COA. Defaults to the original PO information but can be overwritten. Will be blank for a BO.

**Email:** The email address of the requestor. Defaults to the original PO/BO information but can be overwritten.

**Phone:** Phone number of the requestor. Defaults to the original PO/BO information but can be overwritten.

- Fax:** Fax number of the requestor. Defaults to the original PO/BO information but can be overwritten.
- Ship To:** Room number to which the goods are to be shipped. Defaults to the original PO/BO information but can be overwritten.
- Address:** Based on the *Ship To* code, this field will be populated by the system.
- Phone:** Based on the *Ship To* code, this field will be populated by the system.
- Contact:** Based on the *Ship To* code, this field will be populated by the system.
- Attention To:** Name of the person to whom the goods or services are to be shipped. Defaults to the original PO/BO information but can be overwritten.

4. *Next Block.*

The screenshot shows the Oracle Developer Forms Runtime interface for a purchase order. The window title is "Oracle Developer Forms Runtime - Web: Open > FPACHAR". The browser address bar shows "Change Order: Vendor FPACHAR 8.5 (muntrain)".

**Order Information:**

- Purchase Order: P0087325
- Order Date: 20-OCT-2011
- Delivery Date: 31-OCT-2011
- Commodity Total: 17,096.79
- Blanket Order: [Empty]
- Transaction Date: 20-OCT-2011
- Comments: [Empty]
- Accounting Total: 17,096.79
- Change Seq: 1
- In Suspense
- Document Text

**Vendor Information:**

- Vendor: 000036147 Poo Poo Paper
- Address Code: BU
- Sequence Number: 1
- Vendor Hold

**Address Information:**

- Street Line 1: P.O. Box #23058
- Street Line 2: 550 Eglinton Avenue West
- Street Line 3: [Empty]
- City: Toronto
- State or Province: ON
- ZIP or Postal Code: M5S 3A8
- Nation: Canada

**Contact Information:**

- Contact: [Empty]
- Email: [Empty]
- Phone: 877 7667661
- Fax: 416 9813066

**Other Fields:**

- Discount: [Empty]
- FOB Code: [Empty]
- Tax Group: HH  All taxes included
- Disbursing Agent
- Class Code: [Empty]
- Carrier: [Empty]
- Currency: [Empty]
- Freight Terms: [Empty]

At the bottom of the form, there is a status bar with the text "Enter address type code and press NEXT FIELD." and "Record: 1/1".

This is the *Change Order: Vendor* window. Vendor cannot be changed but the address type and sequence number can.

- Vendor: Code and Vendor name representing the vendor. Defaults to the original PO/BO information and cannot be changed.
- Address Code: Code representing the vendor address type. Defaults to the original PO/BO information but can be overwritten with another valid address type for that vendor.
- Seq #: Address type sequence number. Defaults to the original PO/BO information but may change if the *Address Code* is changed.
- Address: Address of the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Phone: Area code and phone number of the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Ext: Phone extension of the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Fax: Fax number of the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Ext: Fax extension of the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Contact: Name or title of the primary contact for the vendor. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Email: E-mail address of the contact person. Defaults based on *Address Code/Seq#* combination as established for the vendor.
- Discount: Not used. Leave blank.
- FOB Code: Not used. Leave blank.
- Tax Group: Code and title of the group of tax rates. Defaults to the original PO/BO information and cannot be changed here.



Vendor: Code representing the vendor and vendor name.

6. *Save* and *Exit* if you checked the *Change All* box.

7. If you did not check the *Change All* box, perform a *Next Block*. This takes you to the *Purchase Order Commodity Information* section of the record where you can selectively choose items from your PO/BO that you want to change.

PO Item: Item number of the commodity on the PO/BO. This is a non-data enterable field.

(Commodity) Code: Not used. Will always be blank.

(Commodity) Desc: Description of the item. This is a non-data enterable field.  
(Line Item Text)

Exists: Indicates if text exists for the item. This is a non-data enterable field.

(Line Item Text)

Option: Drop-down box that allows you to select *Ignore*, *View* or *Copy* item text if it exists.

U/M: Unit of Measure of the item. This is a non-data enterable field.

Units: Number remaining of the item. This is a non-data enterable field.

Unit Price: Unit price of the item. This is a non-data enterable field.

Add: Check box that you check to select the item from the PO/BO that you wish to change.

8. After selecting all of the items you wish, *Save* and *Exit*. You will then be taken to the *Change Order: Commodity/Accounting* window.

This is the *Change Order: Commodity/Accounting* window. It is used to change the quantity and unit price information for each commodity. The commodities here populate based on the items previously selected on the *Purchase Order Item Selection Form*.

- Doc Acctg: This box defaults to a check mark. This is a non-data enterable field.
- Item: Item number of the commodities on the PO/BO. This displays with the *of* field, for example, item 1 of 2.
- U/M: Unit of Measure. This is the code representing the unit of measure of the requested goods. Defaults to the original PO/BO information but can be overwritten.
- Tax Grp: Code and title of the group of tax rates that should be applied to this commodity. Defaults to the original PO/BO information but can be overwritten.
- Quantity: Quantity of a specific item to be ordered. Calculates with the *Unit Price* field to establish the extended cost. Defaults to the original PO/BO information but can be overwritten with the revised quantity required.

Unit Price:	Price of the commodity per unit. Calculates with the <i>Quantity</i> field to establish the extended cost. Defaults to the original PO/BO information but can be overwritten with the revised unit price as required.
Ext Cost:	Total extended cost of the commodity based on the quantity multiplied by unit price.
Comm:	Commodity codes. Not used. Leave blank.
Desc:	Description of the good/service being requested.
Comm Text:	Not used.
Item Text:	Once an item has been entered, you can add item text by selecting <i>Item Text</i> from the <i>Options</i> menu at the top of the screen. Enter text if necessary, <i>Save</i> and <i>Exit</i> . Once back to the <i>Commodity Information</i> screen, the <i>Item Text</i> box will have a check mark indicating text exists for the item.
Add Commodity:	Not used.
Distribute:	Not used.
Disc:	Not used.
Addtl:	Enter any additional amount if applicable and known. This may be shipping etc. Defaults to the original PO/BO information but can be overwritten.
Tax:	Tax amount calculated based on the tax group selected.
Comm Line Total:	Total amount of the current commodity record calculated as extended cost less discount amount plus additional amount plus tax amount.
Doc Comm Total:	Total amount of all the commodities entered on the document.
BO Remaining Balance:	If the CO is being issued for a BO, this field represents the total remaining balance on the BO. <b>Note that this field is visible only if this CO is for a BO.</b>

9. To change more than one commodity, if you selected more than one for change, use the down arrow key on the keyboard and enter the desired changes. Repeat for each item to be changed.
10. Select *Commodity Supplemental Information* from the *Options* menu at the top of the screen if you wish to make changes to the delivery information for individual items so that they are delivered at different times or to different locations. Enter the information and *Close*.

The screenshot shows a window titled "Commodity Supplemental Information FPACHAR 8.5 (muntrain)". The window contains the following fields and values:

- Delivery Date:** 21-OCT-2011
- Text Usage:** Standard
- Ship Code:** A1001
- Street Line 1:** Room: A1001
- Street Line 2:** Comptroller's Office
- Street Line 3:** Memorial University of NF
- Building:** Arts & Administ
- Floor:** (empty)
- Contact:** (empty)

A "Close" button is located at the bottom center of the window.

11. *Next Block* once all information has been entered. This will take you to the accounting information section of the record. **This section will be blank for a BO and the *Next Block* function will take you to the *Balancing/Completion* window instead.** Be sure to observe the message area at the bottom of the screen, as the system will tell you if you must re-distribute the accounting amounts manually.

FOAPAL: The code representing the specific FOAPAL and displays with the *of* field, for example, FOAPAL 1 of 2.

Remaining Comm Amt: Remaining commodity amount. It is the difference between the *FOAPAL Line Total* and the *Document Acctg Total*.

C: Chart of accounts. Will always be “M” for Memorial University.

Yr: Fiscal year. This defaults to the original PO information.

Index: Not used. Leave blank.

Fund: The *Fund* portion of the FOAPAL. This defaults to the original PO information. Do not change.

Orgn: The *Organization* portion of the FOAPAL. This defaults to the original PO information. Do not change.

Acct: The *Account* portion of the FOAPAL. This defaults to the original PO information. Do not change.

Prog: The *Program* portion of the FOAPAL. This defaults to the original PO information. Do not change.

Actv: The *Activity* portion of the FOAPAL if applicable. This defaults to the original PO information. Do not change.

Locn: The *Location* portion of the FOAPAL if applicable. This defaults to the original PO information. Do not change.

Proj: Not used. Leave blank.

NSF Override: Not used.

NSF Suspense: Not used.

Ext: Check this box if you wish to distribute the cost of items by percentage to different FOAPALs. Enter the percentage desired for the highlighted FOAPAL in the field cost would normally be. If you do not wish to use percentages, do not check the box and allocate cost manually to more than one FOAPAL.

Disc: Not used.

Addtl: See *Ext* above. You can use a different percentage for additional cost allocation if you choose.

FOAPAL Line



17. Once the CO has been completed, you are returned to the starting screen and a message is displayed at the bottom of the screen confirming the action.
18. Enter the next PO/BO you wish to issue a change order against or *Exit* the form.